



## **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.

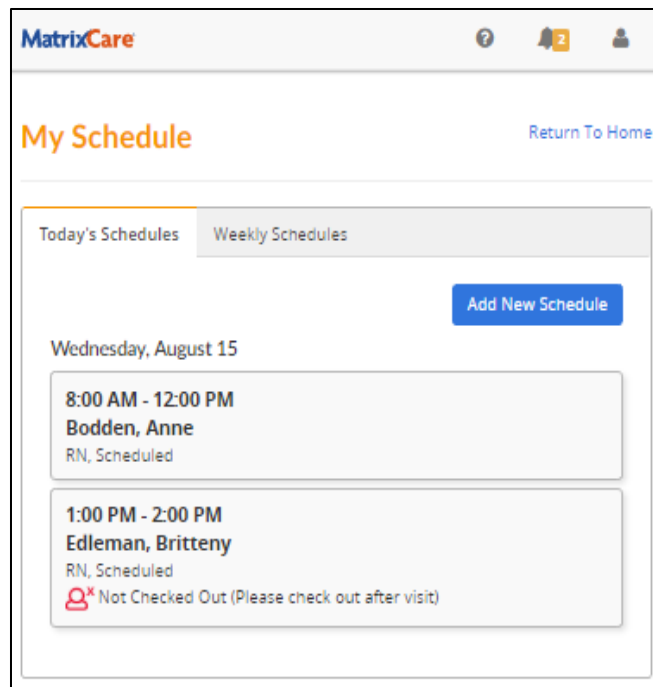
- **Android** - <https://support.google.com/accounts/answer/32050?hl=en>  
**Note:** Check "Cookies and other site data" and "images and files"
- **iOS (safari)** - <https://support.apple.com/en-us/HT201265>
- **IOS (chrome)** - <https://support.google.com/chrome/answer/2392709?co=GENIE.Platform%3DiOS&hl=en>

**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:

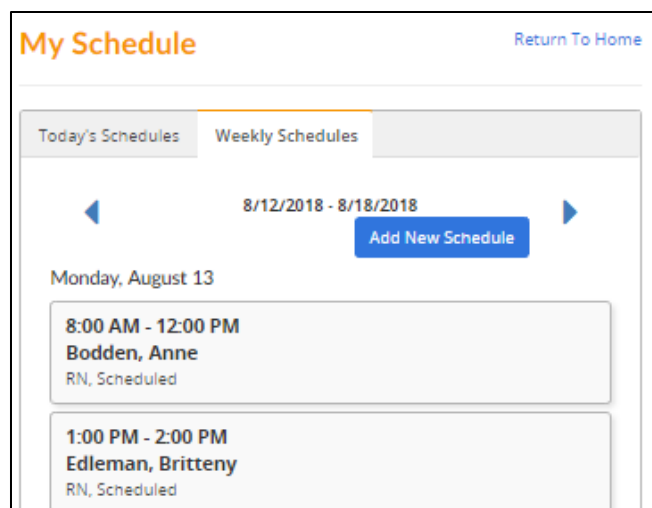
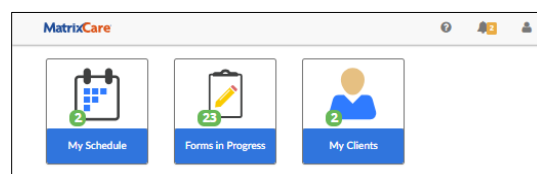
- **MatrixCare** - Pressing the MatrixCare home logo returns you to the Today's Schedules page.
- **Help** - Pressing the question mark provides a quick tour of main functions on each page of the application.
- **Notifications** - Pressing the bell displays a dropdown menu that allows you to view notifications 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.

Client Chart

## Forms

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County

Manage Forms Client Forms

To add a form, select the form below. [Expand All](#) [Collapse All](#)

Assessment Forms

Skilled Nurse Visit Note

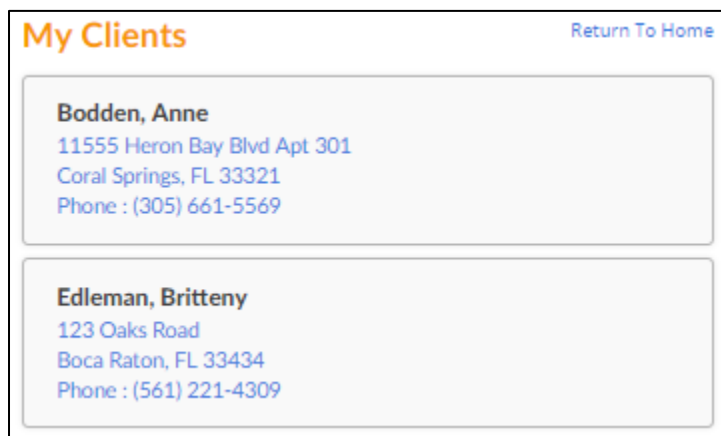
Supplemental Forms

Braden Scale  
Care Coordination Note  
Diagnosis/Surgical Procedure Code Entry  
Fall Risk Assessment MAHC 10  
Home Environment Safety Evaluation  
Hospital Risk Evaluation  
Medical History / Physical / Functional Assessment  
Pain Location Assessment  
Summary (Non-OASIS)  
Supervisory Visits of Home Health Care Staff  
Visit Frequency Order  
Wound Location Assessment

- **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.

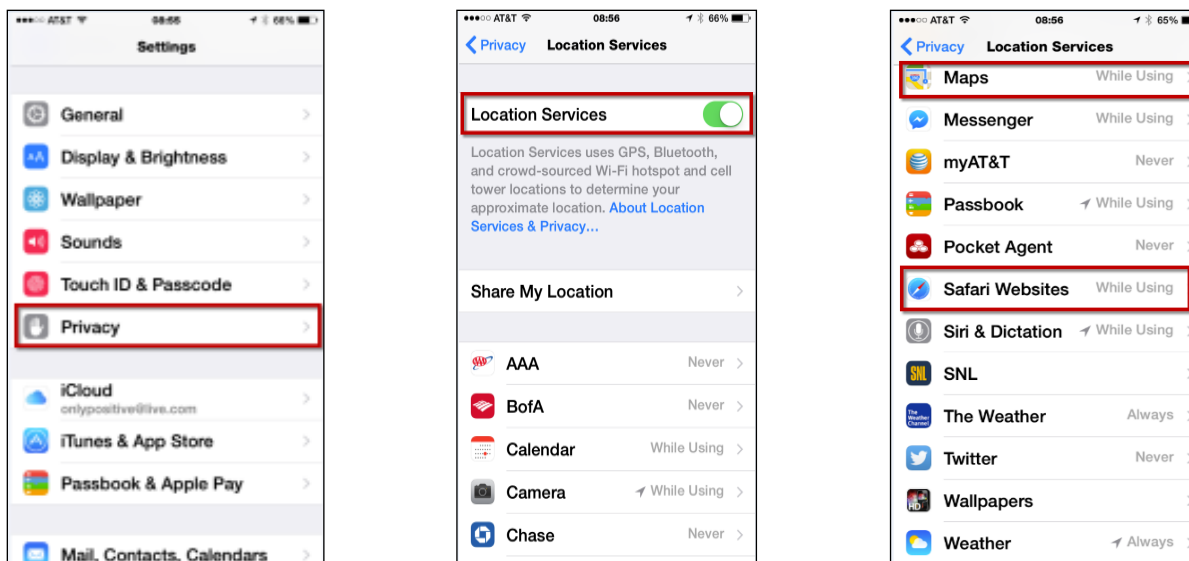
## Enabling Location Services on your Phone

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.

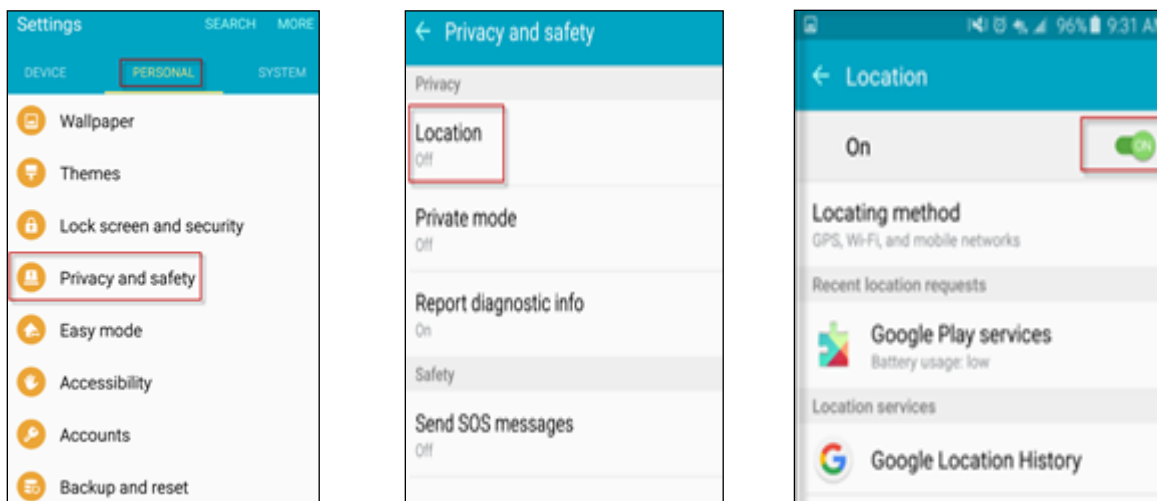


- When complete, press the main bottom button on the phone and swipe up to close the **Settings** application. The phone will default back to the main screen. Your Location Services is now on.

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

- On the top of the main screen, press and swipe down and press **Settings**.
- Scroll down and press **Privacy and Safety**.
- 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.
- Press **Location** option and slide the switch to the right. The switch will turn green.
- 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.

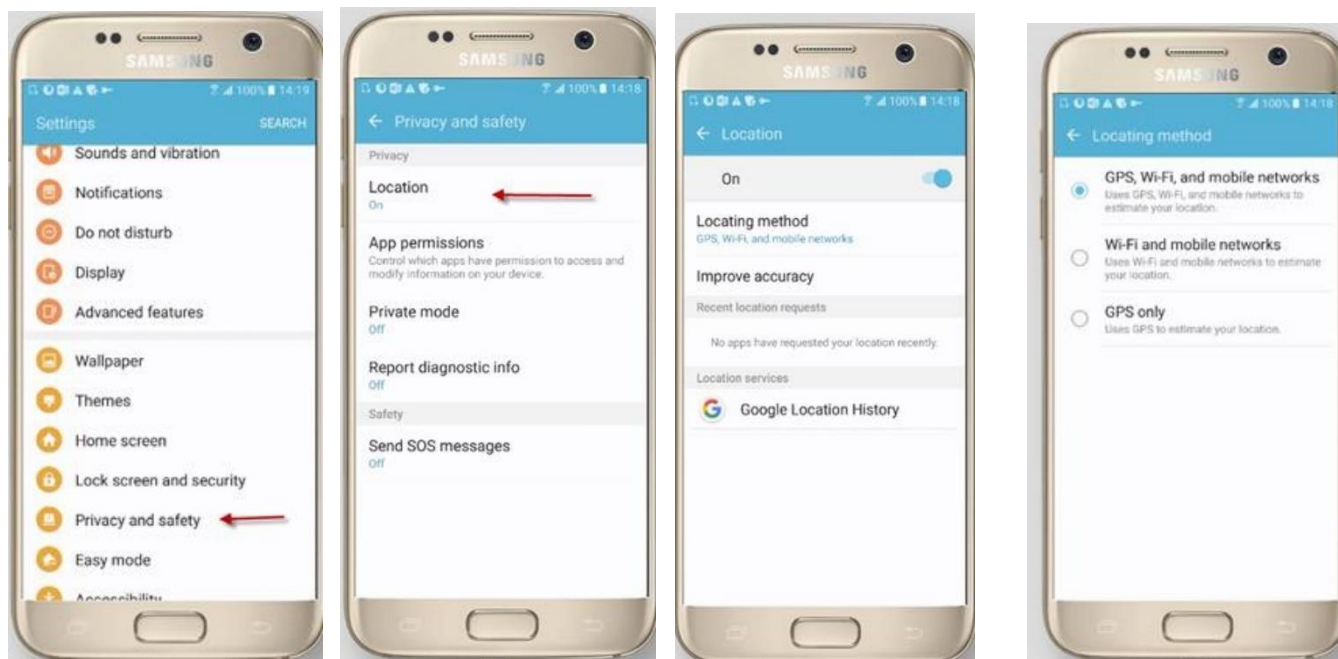
When complete, the phone defaults back to the main screen.



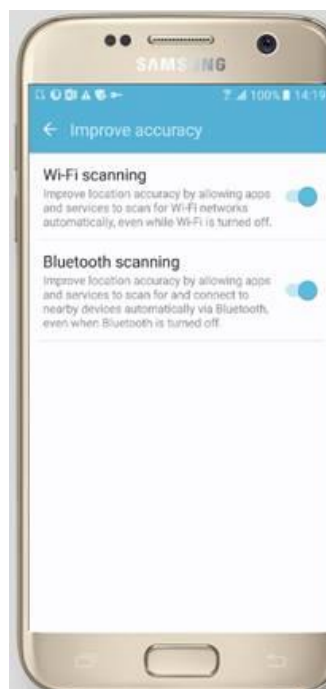
Late model Samsung phones have certain settings that can increase the reliability and accuracy of GPS. Samples shown are for a galaxy S7, but a galaxy s8 will have similar settings.

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

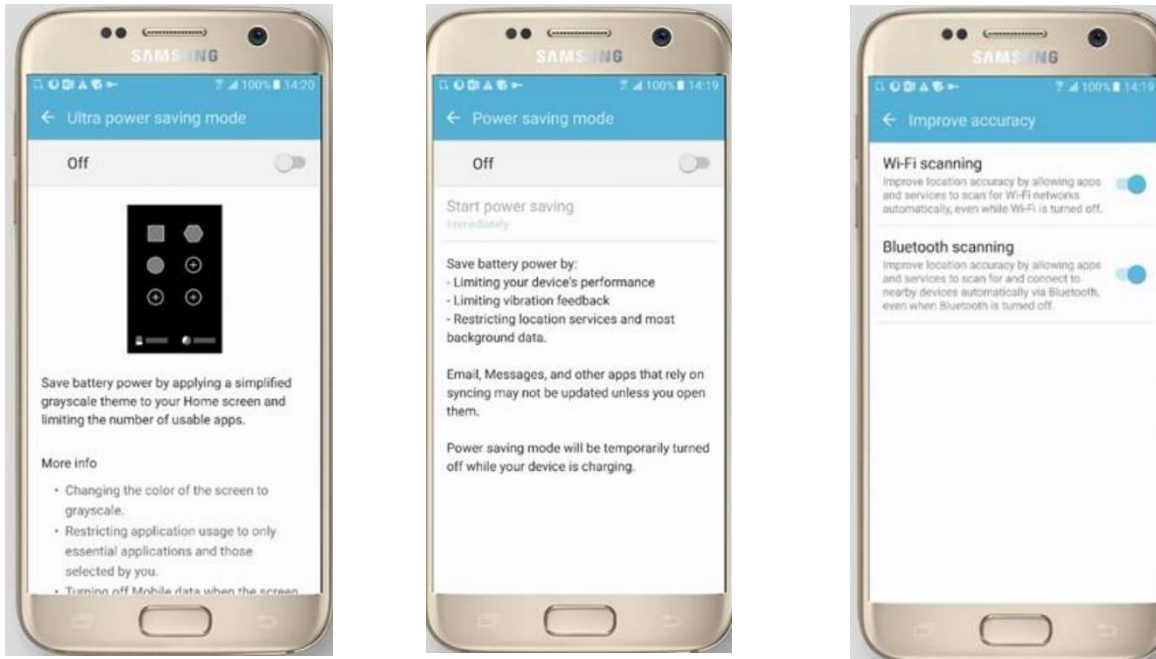
1. On the top of the main screen, press and swipe down and press **Settings** then press **Privacy and safety**.
2. Press **Location** and slide the switch to turn **Locating method** and **Improved accuracy** features on.



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.

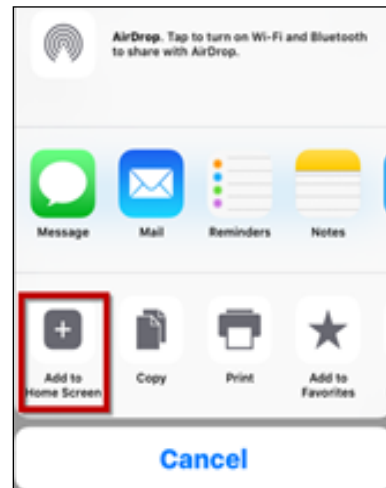
## Setting up your MatrixCare Home Care Home Page

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

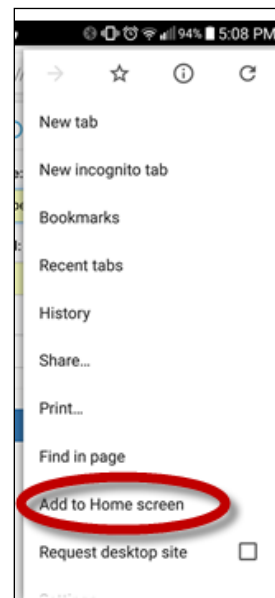
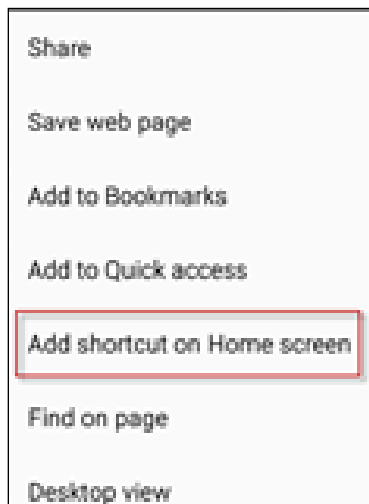
**Note:** This section is applicable for offices that manually create Mobile User accounts.

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.



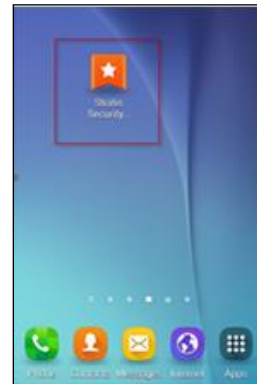
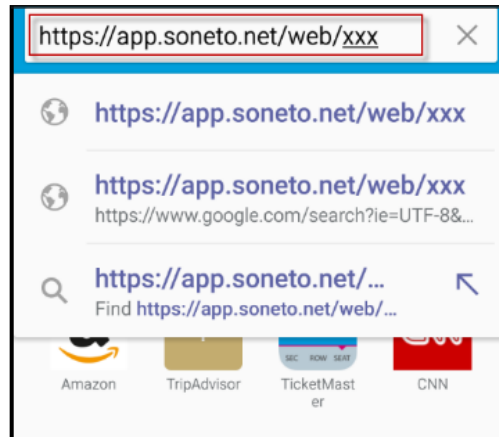
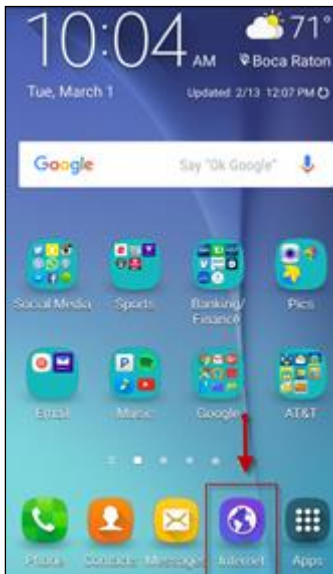
3. Name the home page **"MatrixCare Mobile"**. A short cut is added to the Home page.





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**.

The image shows two side-by-side mobile application screens. The left screen is titled 'Your password must be changed for security reasons'. It contains a password policy: 'Your password must be at least 6 characters long with minimum 0 Upper Case and 0 Lower Case character(s), and have minimum 1 letter(s), 1 number(s) and 0 special character(s)'. Below this are three input fields: 'Current Password', 'New Password', and 'Confirm New Password', each with a red arrow pointing to the password mask. At the bottom is a blue button labeled 'Change Password'. The right screen is the sign-in page. It has three input fields: 'Username:' (containing 'klsmith' with a red arrow), 'Password:' (with a red arrow), and 'Tenant:' (with a placeholder 'Your Company Name'). At the bottom is a blue button labeled 'Sign In'.

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

The image shows a desktop window titled 'MatrixCare End User License Agreement'. The window contains the following text: 'Terms and Conditions of Use User Agreement', 'MatrixCare, Inc. (hereafter "MC") provides this portal/app/software (hereafter the "Portal"), as a service to its customers (hereafter "Agency"), their caregivers, clients, patients, and family members. The Portal may allow these entities to view information about services to be provided including, among other things, home visitations, scheduling, billing and patient health records ("PHR") or provide other services to the Agency.', 'BY CLICKING USING THE PORTAL, YOU (A) ACKNOWLEDGE THAT YOU HAVE READ AND UNDERSTAND THIS AGREEMENT; (B) REPRESENT THAT YOU ARE 18 YEARS OF AGE OR OLDER/OF LEGAL AGE TO ENTER INTO A BINDING AGREEMENT; AND (C) ACCEPT THIS AGREEMENT AND AGREE THAT YOU ARE LEGALLY BOUND BY ITS TERMS. IF YOU DO NOT AGREE TO THESE TERMS, DO NOT USE THE.', and 'Rights to Modify and Amend the Portal. MC reserves the right to modify or amend the Portal at any time and will provide notices of such changes to effected users either via e-mail to your registered e-mail address or via the Portal itself. Your continued use of the Portal means that'. At the bottom, there is a 'License Agreement' section with the text 'Read the agreement carefully, scroll to the bottom, and click the 'Accept' button to continue.' and two buttons: 'Accept' (highlighted with a red box and a mouse cursor) and 'Cancel'.

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

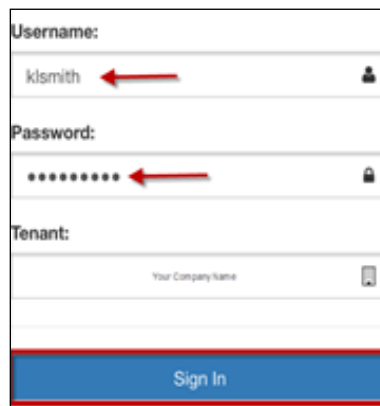
## Signing in to the Mobile Application After the First Time

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

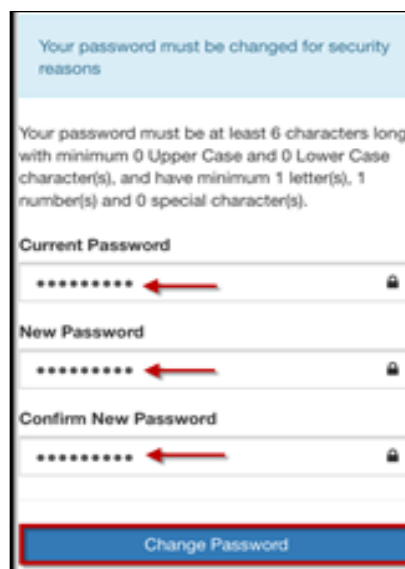
To change the default Password:

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.

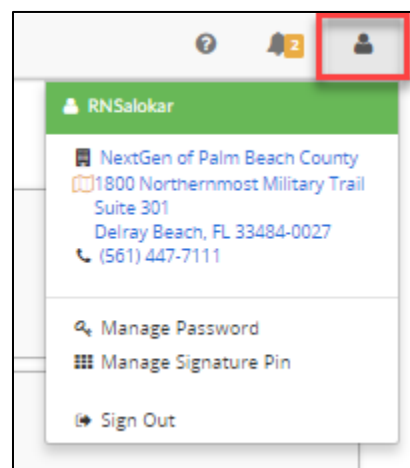
This information is taken from the Main Tab of the Office record, for the Office that is the caregiver's "Belongs To" office. (The caregiver's "Belongs To" office is the "Belongs To" office on their mapped Caregiver record).

The screenshot shows the 'Main' tab of the office configuration page. The 'Office' dropdown is set to 'NextGen of Palm Beach County' with ID '443'. The 'Office Nickname' is 'NextGen of Palm Beach County' and the 'Office Formal Name' is 'NextGen Very Excellent Home Care'. The 'Address Information' section shows 'Address 1' as '1800 Northernmost Military Tribune Trail', 'Address 2' as 'Suite 360', 'City' as 'West Delray Beach', 'State' as 'FL', 'Postal Code' as '33484-1234', 'County' as 'Palm Beach', and 'Country' as 'United States'. A table at the bottom lists phone numbers: a 'Main' number '447-7111 X:12345' and a 'Fax' number '(954) 827-0558...'. Arrows point from the 'Office Nickname' and 'Address 1' fields to the mobile app interface shown in the next block.

Pri	Type	Phone No	Note	Tel.	Txt
▶	✓ Main	447-7111 X:12345			
	Fax	(954) 827-0558...			

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.

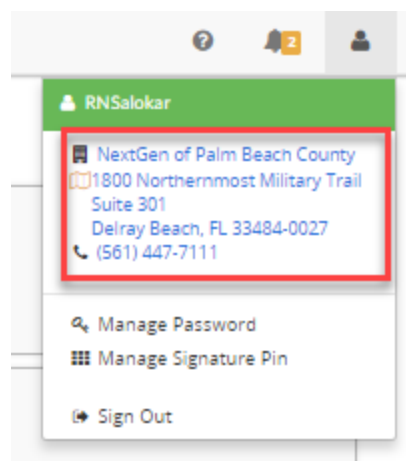


## Office Record: Company URL

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 screenshot shows the 'Advanced' settings page for 'Michael's Office' (ID: 494). The 'Office Settings' section includes fields for 'Office Area Required for Clients' (checkbox), 'Treatment Week Start Day' (dropdown set to 'Sunday'), 'Company URL' (text field containing 'http://www.matrixcare.com/' with an arrow pointing to it), 'Admin Email' (text field), and a 'Send Test E-Mail' button. The 'SMTP Server Information' section includes fields for 'Email Address' (support@stratisinc.com), 'Server Name' (sonetosupport.stratislocal), 'Port' (25), 'User name', 'Password', 'Domain', and a 'Server Requires SSL' checkbox, with a 'Send Test E-Mail' button. The 'OASIS Setup' section includes dropdowns for 'Medicare Payer (M0010)' and 'Medicaid Payer (M0012)', text fields for 'Branch ID (M0016)', 'HHA Agency ID', and 'Default Extract File Path', and a 'Relax Recert Timing Rules (for transition)' checkbox. The 'Mapping Information' section includes a 'Mapping Type' dropdown (Google Maps) and an 'Address Verification' dropdown (Manual).

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 POC User (Skilled) x

Group Permissions/Access

Group: POC User (Skilled)

Unassigned Permissions:

- Admission.CAHPs
- Admission.Discharge
- Admission.Document
- Admission.Document.jabbott
- Admission.H1500
- Admission.OB
- Admission.Payers
- Admission.PlayMakerCRM
- Admission.POC
- Admission.Referral
- Admission.Reports
- Admission.ServicePlan
- Admission.ServicePlans
- Admission.Telehealth

Add

Remove

Assigned Permissions:

Object Name	Read	Edit	Add	Delete
Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.ChartHistory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admission.Physician	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment.ReadyForReview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment.RevertToInProgress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client.Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client.InpatientTracking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client.Payers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My.Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients.Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Apply to Selected Items

Select Deselect Column: Read Apply

# 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.

Group Permissions/Access

Group: **On Call Scheduler**

Unassigned Permissions:

- OfficeSettings.BillRates
- OfficeSettings.Document
- OfficeSettings.Drop Site
- OfficeSettings.DropSite
- OfficeSettings.ElectronicPmtProc
- OfficeSettings.FeeChart
- OfficeSettings.Fran Connect Ro
- OfficeSettings.Help
- OfficeSettings.Holidays
- OfficeSettings.Hours
- OfficeSettings.josh.test
- OfficeSettings.Letters
- OfficeSettings.Margin
- OfficeSettings.MIP

Add

Remove

Assigned Permissions:

Object Name	Read	Edit	Add	Delete
Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.ChartHistory	<input checked="" type="checkbox"/>			
Admission.Medications	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.Physician	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assessment.ReadyForReview				
Assessment.Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment.RevertToInProgress				
Caregiver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver.Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver.HR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver.Payroll	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Apply to Selected Items

☒ Select ☐ Deselect Column: **Read**

# 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**.

The screenshot shows the 'Advanced' settings page for 'NextGen of Palm Beach County'. The 'Module Features' section at the bottom right is highlighted with a red box, indicating that the 'Medication Module' is checked. Other visible settings include:

- Office Settings:** Office Area Required for Clients (unchecked), Treatment Week Start Day (Monday), Company URL (http://www.stratisinc.com), Allow Text Messages (checked), Admin Email (empty), and a 'Send Test E-Mail' button.
- OASIS Setup:** Medicare Payer (M0010) (MEDICARE), Medicaid Payer (M0012) (Medicaid 837P GA), Branch ID (M0016) (N), HHA Agency ID (HH1999999967), Default Extract File Path (empty), and Relax Recert Timing Rules (for transition) (checked).
- SMTP Server Information:** Email Address (empty), Server Name (empty), Port (empty), User name (empty), Password (empty), Domain (empty), and a 'Send Test E-Mail' button.
- Mapping Information:** Mapping Type (Google Maps) and Address Verification (Manual).
- CareCommunity:** Bill/Pay Location ID (76dfd7da-d221-4a21-87db-29dd0eed7245) and Bill/Pay Key (empty).

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.



Admission Referral CAHPS OB Discharge Telehealth PlayMakerCRM VBP Payers Authorizations Assessment

Client: Bodden, Anne SOC: 3/1/2017 Exclude from Billing

Status: Active ID: 7106

Admission Information:

Office: NextGen of Palm Beach County

Medical Record Number: BA-302-495

Release Information: No Release On File N

Assign Benefits:

☒ Enable Medication Module

Admission Source Information:

Verbal SOC Date:

Verbal SOC Taken By:

Source of Admission:

F2F Encounter:

Team Information:

Case Manager: RN Sal

Supervisor: RN Sal

Coordinator:

Primary Diagnosis:

Diagnosis Notes:

MatrixCare

Warning !

You have opted to turn on the 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.

Once this feature is enabled, you cannot disable it.

Click 'Ok' to proceed or 'Cancel' to go back and uncheck this feature.

OK Cancel

Create

Created By msalokar Modified By msalokar

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

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

The screenshot shows the MatrixCare interface for the 'Medications' tab. At the top, there's a navigation bar with tabs like 'Admission', 'Referral', 'CAHPS', 'OB', 'Medications' (highlighted), 'Discharge', 'Telehealth', 'PlayMakerCRM', 'VBP', 'Payers', 'Authorizations', 'Assessments', and 'Services'. Below this, a header section contains client information: 'Client: Bodden, Anne', 'SOC: 3/1/2017', 'Status: Active', and 'ID: 7106'. There's also an 'Exclude from Billing' checkbox. The main content area has a 'MatrixCare' logo, a 'Back' link, and a 'Client Chart' link. The title 'Medications' is prominently displayed, followed by the client's name 'Bodden, Anne' and 'SOC: 03/01/2017, Active, NextGen of Palm Beach County'. Below this, there are two tabs: 'Active Medications' (selected) and 'Discontinued Medications'. At the bottom right, there are two buttons: 'Check Meds' and 'Add Medication'.

- 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)

The screenshot shows the 'Med Profile' tab in the MatrixCare interface. At the top, there's a navigation bar with tabs like 'Intake-1', 'Intake-2', 'Program', 'Diagnosis', 'Orders', 'Goals', 'Assessments', 'Service Plan', 'Service Plan History', 'Med Profile' (highlighted), 'Schedules', 'MOD', 'Billing', 'Attachments', and 'Reports'. Below this, a header section contains client information: 'POC ID: 6981', 'Client: Bodden, Anne', 'Adm ID: 7106', 'SOC: 03/01/2017', 'MR#: BA-302-495', 'Cert. Period: 5/23/2018 - 7/21/2018', 'Discharged: / /', 'CBSA: 22744', and 'HIPPS:'. A message box at the top of the grid states 'This Medication Profile is no longer active.' with a button 'Open Medication Module' highlighted in a red box. Below the message is a table with medication data.

Up	Dn	Order Date	DC Date	C/N	Med	Med Description	Physician	Dose	Amount	Frequency	Route
		5/1/2018	6/5/2018		Tylenol	Tylenol		400mg	2	BID	PO
		5/10/2018	6/5/2018		Warfarin Sodium	Warfarin		4mg	1 tablet	QD	PO

## 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 screenshot shows the MatrixCare web interface. At the top, there's a navigation bar with tabs like Admission, Referral, CAHPS, OB, Medications (selected), Discharge, Telehealth, PlayMakerCRM, VBP, Payers, Authorizations, Assessments, Service Plan, Plan of Care, Physicians, and H1500-1. Below the navigation bar, a header section displays client information: Client: Bodden, Anne, SOC: 3/1/2017, Status: Active, ID: 7106, and an 'Exclude from Billing' checkbox. The main content area is titled 'Medications' and shows details for 'Bodden, Anne', including SOC: 03/01/2017, Active, NextGen of Palm Beach County, and Activity Date: 10/29/2018. There are two tabs: 'Active Medications' (selected) and 'Discontinued Medications'. Under 'Active Medications', a list of medications is shown: Tylenol 8 Hour Geltab 650 mg oral tablet, extended release, 1300 milligram(s), oral, every 8 hours (Dates Prescribed: 10/29/2018 - 10/29/2018), Xanax 0.25 mg oral tablet, 10 milligram(s), oral, 3 times a day (Start Date: 10/25/2018), Tylenol Caplet 325 mg oral tablet, 650 milligram(s), oral, every 4 hours (Start Date: 10/25/2018), and dasatinib 100 mg oral tablet, 100 milligram(s), oral, once a day (Start Date: 10/18/2018). A red box highlights the 'Check Meds' button, and an 'Add Medication' button is also visible.

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:


[< Back](#)[Client Chart](#)


## Medications

**Bodden, Anne**  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Schedule Date: 12/05/2018

[Drug to Drug Interactions](#) | [Dosage Checks](#) | [Duplicate Therapies](#)

*No drug interactions found*

 **Dosage Checks** (\* only age and gender are being considered for dosage checks)

 **Acetaminophen 160 mg oral tablet, chewable**

- Prescribed single dose is low, under by 5 units (1.54%)
- Prescribed daily dose has passed

*No duplicate therapies found*

[WARNING DISCLAIMER](#)

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

---

### Drug to Drug Interactions

**Acetaminophen 325 mg oral tablet ↔ Dasatinib 100 mg oral tablet**  
Interaction Type: Dasatinib / Acetaminophen  
Severity: Major  
Acetaminophen may enhance the hepatotoxic effect of Dasatinib. Dasatinib may increase the serum concentration of Acetaminophen.

**ALPRAZolam 0.25 mg oral tablet ↔ HYDROmorphine 12 mg oral tablet, extended release**  
Interaction Type: Opioid Analgesics / CNS Depressants  
Severity: Major  
CNS Depressants may enhance the CNS depressant effect of Opioid Analgesics.

**Aspirin 162.5 mg oral capsule, extended release ↔ Dasatinib 100 mg oral tablet**  
Interaction Type: Agents with Antiplatelet Properties / Dasatinib  
Severity: Major  
Dasatinib may enhance the anticoagulant effect of Agents with Antiplatelet Properties.

**Acetaminophen 325 mg oral tablet ↔ HYDROmorphine 12 mg oral tablet, extended release**  
Interaction Type: Acetaminophen / Opioid Analgesics  
Severity: Minor  
Opioid Analgesics may decrease the absorption of Acetaminophen. The extent to which this decreases total systemic exposure to acetaminophen ... [Show More](#)

### 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 7 units (233.33%)
- Prescribed daily dose is high, over by 20 units (200%)

## Medications

Bodden, Anne

SOC: 03/01/2017, Active, NextGen of Palm Beach County

Activity Date: 10/25/2018

### Medication Search



Search

### Medication Selected

ALPRAZolam 0.25 mg oral tablet

### Drug to Drug Interactions

ALPRAZolam 0.25 mg oral tablet ↔  
HYDROmorphine 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

#### \* 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.

The screenshot shows the 'Medications' form for a patient named Anne Bodden. The form includes a 'Medication Search' section with a text input containing 'Vitamin c' and a 'Search' button. Below this, the 'Medication Selected' section shows 'Vitamin C 100 mg oral tablet, chewable'. A message box states 'No major drug interactions found'. The 'Frequently prescribed doses and frequencies' section shows 'Vitamin C 100 mg oral tablet, chewable - 100 milligram(s) - once a day (once a day)'. The form has fields for 'Dose' (100), 'Unit' (milligram(s)), and 'Frequency' (once a day (once a day)). A message box states 'No dosage warnings found'. There is a checkbox for 'PRN (As Needed)' and an 'Indication' dropdown menu.

< Back Client Chart

### Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 10/25/2018

**Medication Search**

Vitamin c

Search

**Medication Selected**

Vitamin C 100 mg oral tablet, chewable

No major drug interactions found

**Frequently prescribed doses and frequencies**

Vitamin C 100 mg oral tablet, chewable - 100 milligram(s) - once a day (once a day)

\* Dose

100

\* Unit

milligram(s)

\* Frequency

once a day (once a day)

No dosage warnings found

☐ PRN (As Needed)

\* Indication

## 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.

Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County

dasatinib 100 mg oral tablet, 100 milligram(s), oral, once a day

**Classifications:**

- Antineoplastic Agent, Tyrosine Kinase Inhibitor
- Antineoplastic Agent, BCR-ABL Tyrosine Kinase Inhibitor

Start Date: 10/18/2018  
Medication Status: New  
Indication: Infection  
[Medication History](#)  
[Teaching Sheet](#)

Ordering Physician  
Dr. William Salts

Special Instructions  
Take with water

SIG  
dasatinib 100 mg oral tablet, take 100 milligram(s) once a day (once a day) for Infection. Take with water (New)

Discontinue



# 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 screenshot shows a mobile application interface for medication management. At the top, there are links for '< Back' and 'Client Chart'. The main heading is 'Medications' in orange. Below it, the patient's name 'Bodden, Anne' is displayed, followed by 'SOC: 03/01/2017, Active, NextGen of Palm Beach County' and 'Schedule Date: 10/22/2018'. The medication name 'Tylenol 8 Hour 650 mg oral tablet, extended release, 1300 milligram(s), oral, every 8 hours' is shown in bold. Under 'Classifications:', there is a bullet point for 'Analgesic, Nonopioid'. 'Dates Prescribed: 10/22/2018 - 10/22/2018' and 'Indication: Pain' are listed. A menu with 'Medication History' and 'Teaching Sheet' (highlighted with a red box) is present. Below this, the 'SIG' section shows 'Tylenol 8 Hour 650 mg oral tablet, extended release, take 1300 milligram(s) every 8 hours (Q8H) for Pain.' The 'Discontinue Reason' is 'Order Changed'. At the bottom, there is a red 'Discontinue' button.

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, Elixure Fever Pain, Mapap, Medi-Tabs, Q-Pap, Silapap Childrens, Tectinal, 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 screenshot shows the MatrixCare web application interface. At the top, there's a navigation bar with tabs like 'Admission', 'Referral', 'CAHPS', 'OB', 'Medications' (which is highlighted), 'Discharge', 'Telehealth', 'PlayMakerCRM', 'VBP', 'Payers', 'Authorizations', 'Assessments', and 'Service'. Below the navigation bar, there's a header section with client information: 'Client: Bodden, Anne', 'SOC: 3/1/2017', 'Status: Active', and 'ID: 7106'. There's also a checkbox for 'Exclude from Billing'. The main content area has a 'MatrixCare' logo and a 'Client Chart' link. Below this, there's a 'Medications' section with a 'Back' link. Under 'Medications', there are two tabs: 'Active Medications' (selected) and 'Discontinued Medications'. At the bottom right of the 'Active Medications' tab, there are two buttons: 'Check Meds' and 'Add Medication'. The 'Add Medication' button is highlighted with a red rectangular box.

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

This screenshot shows the same MatrixCare interface as the previous one, but with the 'Medication Search' section expanded. It features a text input field labeled 'Enter a Medication' and a 'Search' button. The client information at the top remains the same, but the 'Activity Date' is now visible as '08/17/2018'. The 'Medication Search' section is located below the 'Active Medications' tab.

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

Start Page x Telephony x Client List x Bodden, A x 7106. Bodden, A SOC: 3/1/2017 x

Admission Referral CAHPS OB Medications Discharge Telehealth PlayMakerCRM VBP Payers Authorizations Assessments Service Plan Plan of Care Physicians H1500-1

Client: Bodden, Anne SOC: 3/1/2017 Exclude from Billing

Status: Active ID: 7106

**MatrixCare** ? 1

[Back](#) [Client Chart](#)

## Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 08/17/2018

**Medication Search**

Tylenol

### 3. Click Search.

Start Page x Telephony x Client List x Bodden, A x 7106. Bodden, A SOC: 3/1/2017 x

Admission Referral CAHPS OB Medications Discharge Telehealth PlayMakerCRM VBP Payers Authorizations Assessments Service Plan Plan of Care Physicians H1500-1

Client: Bodden, Anne SOC: 3/1/2017 Exclude from Billing

Status: Active ID: 7106

**MatrixCare** ? 1

[Back](#) [Client Chart](#)

## Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 08/17/2018

**Medication Search**

Tylenol

**97 distinct record(s) found**

**Routes:**

**Dosing Forms:**

SEARCH RESULTS	GENERIC MED INFO
Children's Tylenol 160 mg oral tablet, chewable	acetaminophen 160 mg oral tablet, chewable

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.

Client: Bodden, Anne SOC: 3/1/2017 ID: 7106

Status: Active

MatrixCare

Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 08/17/2018

Medication Search

Tylenol Search

Routes: Oral

Dosing Forms: Tablet, Extended Release

Strengths: 650 mg

SEARCH RESULTS	GENERIC MED INFO
Tylenol 8 Hour 650 mg oral tablet, extended release	acetaminophen 650 mg oral tablet, extended release
Tylenol 8 Hour Geltab 650 mg oral tablet, extended release	acetaminophen 650 mg oral tablet, extended release
Tylenol 8 HR Arthritis Pain 650 mg oral tablet, extended release	acetaminophen 650 mg oral tablet, extended release

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.

Start Page | NextGen of Palm Beach County | Client List | Bodden, A | 7106. Bodden, A SOC: 3/1/2017

Admission | Referral | CAHPS | OB | **Medications** | Discharge | Telehealth | PlayMakerCRM | VBP | Payers | Authorizations | Assessments | Service Plan | Plan of Care | Physicians | H1500-1 | H1500-2 | UB0

Client: Bodden, Anne | SOC: 3/1/2017 | Exclude from Billing  
Status: Active | ID: 7106

**MatrixCare**

[Back](#) [Client Chart](#)

## Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 08/19/2018

**Medication Search**

Tylenol

**Medication Selected**

Tylenol 8 Hour 650 mg oral tablet, extended release

**Frequently prescribed doses and frequencies**

Tylenol 8 Hour 650 mg oral tablet, extended release - 1300 milligram(s) - every 8 hours (Q8H)

\* Dose  \* Unit

\* Frequency  ☐ PRN (As Needed)

- 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.

MatrixCare

Client: Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 08/19/2018

Medication Search  
Tylenol Search

Medication Selected  
Tylenol 8 Hour 650 mg oral tablet, extended release

Frequently prescribed doses and frequencies  
Tylenol 8 Hour 650 mg oral tablet, extended release - 1300 milligram(s) - every 8 hours (Q8H)

\* Dose  
1300

\* Unit  
milligram(s)

\* Frequency  
every 8 hours (Q8H) ☐ PRN (As Needed)

\* Indication

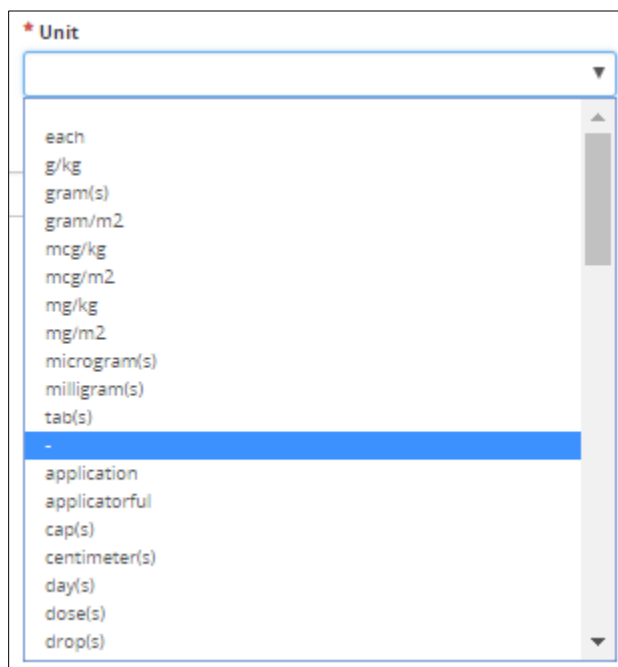
6. Click to add, modify or select an item in the following medication fields.
- **Dose** – must be a valid number greater than zero with no more than eight digits to the left and four digits to the right of the decimal.

\* Dose

0

Must be a valid number greater than 0 with no more than 8 digits to the left and 4 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.



\* Unit

each

g/kg

gram(s)

gram/m2

mcg/kg

mcg/m2

mg/kg

mg/m2

microgram(s)

milligram(s)

tab(s)

-

application

applicatorful

cap(s)

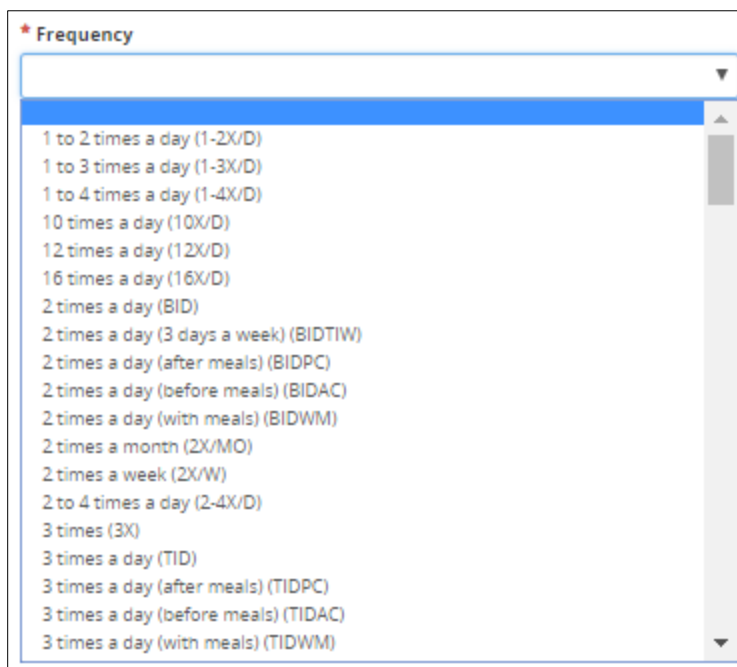
centimeter(s)

day(s)

dose(s)

drop(s)

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



\* Frequency

1 to 2 times a day (1-2X/D)

1 to 3 times a day (1-3X/D)

1 to 4 times a day (1-4X/D)

10 times a day (10X/D)

12 times a day (12X/D)

16 times a day (16X/D)

2 times a day (BID)

2 times a day (3 days a week) (BIDIW)

2 times a day (after meals) (BIDPC)

2 times a day (before meals) (BIDAC)

2 times a day (with meals) (BIDWM)

2 times a month (2X/MO)

2 times a week (2X/W)

2 to 4 times a day (2-4X/D)

3 times (3X)

3 times a day (TID)

3 times a day (after meals) (TIDPC)

3 times a day (before meals) (TIDAC)

3 times a day (with meals) (TIDWM)



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

The screenshot shows a 'Frequency' dropdown menu with 'every 8 hours (Q8H)' selected. To the right of the dropdown is a checkbox labeled 'PRN (As Needed)', which is highlighted with a red rectangular box.

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

The screenshot shows an 'Indication' dropdown menu. The list of options includes Anxiety, Constipation, Depression, Diabetes, Diarrhea, Dyspnea, Edema, Hypertension, Hypotension, Infection, Nausea, Pain, and Other. The 'Pain' option is currently selected and highlighted in blue.

**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.

The screenshot shows the 'Indication' dropdown menu with 'Other' selected. To the right of the dropdown is a text box labeled 'Specify Other'. Below the text box, the text 'This is a required field' is displayed in red.

The screenshot shows the 'Specify Other' text box with the word 'Fever' entered.

Additional fields will display after Indication is selected.

9. Status; if applicable, check one of the check boxes:

- New Medication
- Changed Medication

The screenshot shows a 'Status' section with two checkboxes: 'New Medication' and 'Changed Medication'. Both checkboxes are currently unchecked.

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

Special Instructions

Take with water.

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.

SIG

Tylenol 8 Hour 650 mg oral tablet, extended release, take 13000 milligram(s) every 8 hours (Q8H) for Pain. Take with water (New)

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

\* Start Date

5/21/2018

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.

Ordering Physician

Perform a Physician Lookup

Physician Search

Admission Physicians:

Search:

! 2 char minimum

Search

Cancel




- 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**.

Physician Search

**Admission Physicians:**

Search:   9 record(s) found

! 2 char minimum

 Fox, Cristina G Family Practice NextGen of Palm Beach County	Fox Medical Associates 21230 Saint Andrews Blvd Boca Raton, FL 33433
 Fox, Frederick Family Practice NextGen Coral Springs	Coral Springs Medical Group 8990 University Drive Coral Springs, FL 33076
 Fox, Manning Family Practice, Internal Medicine, Geriatrics NextGen of Palm Beach County	Fox Medical Associates 21230 Saint Andrews Blvd, Suite 101 Boca Raton, FL 33433-8902

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

**Ordering Physician**

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

The screenshot shows the MatrixCare web application interface. At the top, there's a navigation bar with tabs like 'Admission', 'Referral', 'CAHPS', 'OB', 'Medications' (which is active), 'Discharge', 'Telehealth', 'PlayMakerCRM', 'VBP', 'Payers', 'Authorizations', 'Assessments', 'Service Plan', 'Plan of Care', 'Physicians', and 'H1500-1'. Below the navigation bar, a header section contains client information: 'Client: Bodden, Anne', 'SOC: 3/1/2017', and 'ID: 7106'. There's also a checkbox for 'Exclude from Billing'. The main content area has a 'MatrixCare' logo and a 'Client Chart' link. Below this, there's a 'Medications' section with a 'Back' link. Under 'Medications', there are two tabs: 'Active Medications' (selected) and 'Discontinued Medications'. To the right of these tabs are two buttons: 'Check Meds' and 'Add Medication'. The list of active medications shows one entry: 'Tylenol 8 Hour Geltab 650 mg oral tablet, extended release, 1300 milligram(s), oral, every 8 hours' with a 'Start Date: 10/29/2018'.

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

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

The screenshot shows the 'Medication Details' page in the MatrixCare application. The top navigation bar is the same as the previous screenshot. The header section shows the client information: 'Client: Bodden, Anne', 'SOC: 03/01/2017, Active, NextGen of Palm Beach County', and 'Activity Date: 08/17/2018'. The main content area has a 'Back' link and a 'Client Chart' link. Below this, the 'Medications' section is titled 'Tylenol 8 Hour Geltab 650 mg oral tablet, extended release, 1300 milligram(s), oral, every 8 hours'. Under this title, there are several fields: 'Start Date: 08/17/2018', 'Indication: Pain', 'Medication History' (a link), 'Ordering Physician: Dr. Manning Fox', 'Special Instructions: Take with water', and 'SIG: Tylenol 8 Hour Geltab 650 mg oral tablet, extended release, take 1300 milligram(s) every 8 hours (Q8H) for Pain. Take with water'. At the bottom left, there is a red 'Discontinue' button.

# Discontinuing a Medication

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

Start Page | Telephony | Client List | Bodden, A | 7106, Bodden, A SOC: 3/1/2017 | Medications | Discharge | Telehealth | PlayMakerCRM | VSP | Payers | Authorizations | Assessments | Service Plan | Plan of Care | Physicians | H1500-1

Client: Bodden, Anne | SOC: 3/1/2017 | Exclude from Billing | Status: Active | ID: 7106

**MatrixCare**

[Back](#) [Client Chart](#)

## Medications

Bodden, Anne  
SOC: 03/01/2017, Active, NextGen of Palm Beach County  
Activity Date: 08/17/2018

**Tylenol 8 Hour Geltab 650 mg oral tablet, extended release, 1300 milligram(s), oral, every 8 hours**

Start Date: 08/17/2018  
Indication: Pain  
[Medication History](#)

**Ordering Physician**  
Dr. Manning Fox

**Special Instructions**  
Take with water

**SIG**  
Tylenol 8 Hour Geltab 650 mg oral tablet, extended release, take 1300 milligram(s) every 8 hours (Q8H) for Pain. Take with water

**Discontinue**

### Discontinue Medication

**Discontinue Date \***

8/17/2018

**Discontinue Reason \***

2. Enter the date the medication will be discontinued. The default date is today's 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.

## Discontinue Medication

**Discontinue Date**

8/17/2018

**Discontinue Reason**

Order Changed

Confirm

Cancel

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

Start Page
Client List
Bodden, A
7106. Bodden, A SOC: 3/1/2017

Admission
Referral
CAHPS
OB
**Medications**
Discharge
Telehealth
PlayMakerCRM
VBP
Payers
Authorizations
Assessments
Service Plan
Plan of Care
Physicians
H1500-1

Client: Bodden, Anne
SOC: 3/1/2017
Exclude from Billing
Status: Active
ID: 7106

MatrixCare

Back
Client Chart

## Medications

Bodden, Anne

SOC: 03/01/2017, Active, NextGen of Palm Beach County

Activity Date: 10/29/2018

Active Medications

Discontinued Medications

Check Meds
Add Medication

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.

The screenshot shows the MatrixCare web application interface. At the top, there is a navigation bar with tabs: Start Page, Telephone, Client List, Bodden, A, 7106, Bodden, A SOC: 3/1/2017, Discharge, Telehealth, PlayMakerCRM, VBP, Payers, Authorizations, Assessments, Service Plan, Plan of Care, Physicians, and H1500-1. Below the navigation bar, there is a header section with client information: Client: Bodden, Anne, SOC: 3/1/2017, Status: Active, ID: 7106, and an 'Exclude from Billing' checkbox. The main content area is titled 'Medications' and includes a 'Back' link and a 'Client Chart' link. Below the title, there is a section for 'Bodden, Anne' with details: SOC: 03/01/2017, Active, NextGen of Palm Beach County, and Activity Date: 08/17/2018. There are two tabs: 'Active Medications' and 'Discontinued Medications'. The 'Discontinued Medications' tab is selected, showing a list of medications. One medication is listed: Tylenol 8 Hour 650 mg oral tablet, extended release, 1300 milligram(s), oral, every 8 hours prn. Below the medication name, it says 'Dates Prescribed: 06/15/2018 - 06/15/2018'.

## 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.

Client List
Adare, B
5061. Adare, B SOC: 12/7/2016
MedicationReport

Display Regimen
☐ True
☒ False
Hide D/C Meds:
☐ True
☒ False
Display Office Logo:
☐ True
☒ False
Hide Signatures
☐ True
☒ False
View Report

1 of 1
75%
Find Next

### 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) 990-8308

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

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	Ronase 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)
<b>Fox, Frederick</b>	<b>(561) 447-9303</b>
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)
<b>Saife, William</b>	<b>(561) 882-4400</b>

#### Initials/Signature/Title/Date:

( )	( )	( )
( )	( )	( )

Confidential Data.

rpiChartMedicationProfile requested by (REGRESSION)msalak 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.

Group Permissions POC User (Skilled) x

Group Permissions/Access

Group: POC User (Skilled)

Unassigned Permissions:

- Admission.CAHPs
- Admission.Discharge
- Admission.Document
- Admission.Document.jabbott
- Admission.H1500
- Admission.OB
- Admission.Payers
- Admission.PlayMakerCRM
- Admission.POC
- Admission.Referral
- Admission.Reports
- Admission.ServicePlan
- Admission.ServicePlans
- Admission.Telehealth

Add

Remove

Assigned Permissions:

Object Name	Read	Edit	Add	Delete
Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.ChartHistory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admission.Physician	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment.ReadyForReview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment.RevertToInProgress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client.Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client.InpatientTracking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client.Payers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My.Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients.Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Apply to Selected Items

Select Deselect Column: Read Apply

# 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.

Group Permissions On Call Scheduler X

Group Permissions/Access

Group: On Call Scheduler

Unassigned Permissions:

- OfficeSettings.BillRates
- OfficeSettings.Document
- OfficeSettings.Drop Site
- OfficeSettings.Drop Site
- OfficeSettings.ElectronicPmtPr
- OfficeSettings.FeeChart
- OfficeSettings.Fran Connect Ro
- OfficeSettings.Help
- OfficeSettings.Holidays
- OfficeSettings.Hours
- OfficeSettings.josh.test
- OfficeSettings.Letters
- OfficeSettings.Margin
- OfficeSettings.MIP

Add

Remove

Assigned Permissions:

Object Name	Read	Edit	Add	Delete
Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.ChartHistory	<input checked="" type="checkbox"/>			
Admission.Medications	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission.Physician	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assessment.ReadyForReview				
Assessment.Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment.RevertToInProgress				
Caregiver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver.Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver.HR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver.Payroll	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Apply to Selected Items

Select Deselect Column: Read Apply

## 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.

NextGen of Palm Beach County

Owners Hours Fee Charts Wage Charts Scripting Letters Gross Margin Tax Groups Reports **Telephony**

Office: NextGen of Palm Beach County ID: 443

Telephony Provider: Stratis

**Telephony Account Settings:**

Login Name: NextGen\_PalmBeach

Password: \*\*\*\*\*

Account ID: NextGen\_PalmBeach

Service Code: [Dropdown]

Mileage Code: MILEAGE

Upload Interval: 0 Download Interval: 0

Upload Range: 0

Log XML Up: [X] Log XML Down: [X]

Tel. Parent Office: NextGen of Palm Be [Dropdown]

**Telephony Schedule Match Settings:**

Allow creation of a new schedule if downloaded schedule does not match an existing one [X]

Round Call Times when imported into schedules [X]

Round call times to how many minutes: 5

Set telephony-completed schedules directly to schedule status of complete [X]

Telephony Time Source: Use Call Time [Dropdown]

Automatic Schedule Service Change Behavior: [Dropdown]

**Telephony Schedule Threshold Settings:**

Time Threshold before arrival: 15

Time Threshold after arrival: 15

Time Threshold before departure: 15

Time Threshold after departure: 15

Time & Attendance: Location Threshold: 0.2000

Time & Attendance: Minimum Accuracy: 0.5000

**Notification Settings:**

From: telephony@stratisinc.com

To: (Select any recipients you want to receive emails)

Missed CheckIn Missed CheckOut

[X] Case Manager

[X] Caregiver

[X] [Dropdown]

30 Notification Reset Threshold

Test Notify

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.

MatrixCare

Schedule Details

Bodden, Anne

Appointment Tasks **Expenses**

**MILEAGE** New Expense

12 Miles

**EXPENSES**

2 Gloves

Save

## 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.

Check in recorded  
Location Not Correct: You are 9.8 mile(s) away from the client, you should be within 3 mile(s)

Configure the highlighted areas on the office Telephony Tab.

The screenshot shows the 'Telephony' tab in the 'NextGen of Palm Beach County' application. The page is divided into several sections:

- Header:** Office: NextGen of Palm Beach County, ID: 443
- Telephony Provider:** Stratis
- Telephony Account Settings:**
  - Login Name: NextGen\_PalmBeach
  - Password: [Redacted]
  - Account ID: NextGen\_PalmBeach
  - Service Code: [Dropdown]
  - Mileage Code: [Dropdown]
  - Upload Interval: 0, Download Interval: 0
  - Upload Range: 0
  - Log XML Up: [Checked], Log XML Down: [Checked]
  - Tel. Parent Office: NextGen of Palm Be
- Telephony Schedule Match Settings:**
  - Allow creation of a new schedule if downloaded schedule does not match an existing one: [Unchecked]
  - Round Call Times when imported into schedules: [Checked]
  - Round call times to how many minutes: 5
  - Set telephony-completed schedules directly to schedule status of complete: [Checked]
  - Telephony Time Source: Use Call Time
  - Automatic Schedule Service Change Behavior: [Dropdown]
- Telephony Schedule Threshold Settings:**
  - Time Threshold before arrival: 15
  - Time Threshold after arrival: 15
  - Time Threshold before departure: 15
  - Time Threshold after departure: 15
  - Time & Attendance: Location Threshold: 0.2000
  - Time & Attendance: Minimum Accuracy: 0.5000
- Notification Settings:**
  - From: telephony@stratisinc.com
  - To: (Select any recipients you want to receive emails)
    - Missed CheckIn: [Unchecked]
    - Missed CheckOut: [Unchecked]
    - Case Manager: [Unchecked]
    - Caregiver: [Unchecked]
    - michael.salokar@matrixcare.com: [Checked]
    - Notification Reset Threshold: 30
  - Test Notify button

**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.

Office: NextGen of Palm Beach County ID: 443

Activities Communications From Date: 4/15/2017 To Date: 6/14/2017 Search

Start Time	Notes	Subject	Category	Type	Results	End Time
4/23/2017 11:00 AM	When: Saturday, May 6th. 11AM-3PM	Come out next week for food, fellows...	Portal	Caregiver Anno...	Posted	5/26/2017 3:00 PM

Entity Name Reminder Notify

Office NextGen of Palm Beach Co... ☐

Staff Freeman, Kelley ☐

Details Related Entities History

Office: NextGen of Palm Beach Share Level: Everyone Cost: \$0.00

Start: 4/23/2017 11:00 AM End: 5/26/2017 03:00 PM 796.00...

Category: Portal Type: Caregiver Announceme Result: Posted

Subject: Come out next week for food, fellowship and fun at our Caregiver picnic!

Notes: When: Saturday, May 6th. 11AM-3PM Where: Robert Moses State Park

Letter:

Display On Calendar: ☐

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

5 Notifications

Come out next week for food, fellowship and fun at our Caregiver picnic!  
When: Saturday, May 6th. 11AM-3PM Where: Robert Moses State Park

Pick up your new badge

Cardiac Care Training  
Scheduled: May 12, 2017

CPR Certification Expires  
Expires: May 31, 2017

Safety & Risk Expires  
Expires: May 31, 2017

## 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.

The screenshot shows the 'Office Record: Portal Schedule Date Range' settings page. The 'Office' is set to 'NextGen of Palm Beach County' with ID '443'. The 'Portal' tab is selected. The 'Caregiver Sch.Range:Past' is set to 7 and 'Caregiver Sch.Range:Future' is set to 14. The 'Client Sch.Range:Past' is set to 3 and 'Client Sch.Range:Future' is set to 7. The 'Display Client Phone Numbers' checkbox is checked. The 'Portal URL' is 'https://sonetoqaweb.'. The 'Client Inquiry Email To' and 'Caregiver Inquiry Email To' fields are empty. The 'Client Inquiry Referral Source' and 'Caregiver Inquiry Referral Src' fields are empty. The 'Client Inquiry Submit Msg' and 'Caregiver Inquiry Submit Msg' fields are empty. The 'Client Inquiry Submit URL' and 'Caregiver Inquiry Submit URL' fields are empty. The 'Client Inquiry Submit URL Text' and 'Caregiver Inquiry Submit Text' fields are empty. The 'Display CaregiverPhones' checkbox is checked. The 'Show SvcPlan On Client Portal' checkbox is checked.

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.

The screenshot shows the 'Office Record' settings for 'NextGen of Palm Beach County' (ID: 443). The 'Portal' tab is selected in the top navigation bar. The 'Display Client Phone Numbers' checkbox is checked and highlighted with a red box. Other settings include:

- Caregiver Sch.Range:Past: 7
- Caregiver Sch.Range:Future: 14
- Client Sch.Range:Past: 3
- Client Sch.Range:Future: 7
- Portal URL: https://sonetoqaweb.
- Client Inquiry Email To: [empty]
- Caregiver Inquiry Email To: [empty]
- Client Inquiry Referral Source: [empty]
- Caregiver Inquiry Referral Src: [empty]
- Client Inquiry Submit Msg: [empty]
- Caregiver Inquiry Submit Msg: [empty]
- Client Inquiry Submit URL: [empty]
- Caregiver Inquiry Submit URL: [empty]
- Client Inquiry Submit URL Text: [empty]
- Caregiver Inquiry Submit Text: [empty]
- Display CaregiverPhones: [checked]
- Show SvcPlan On Client Portal: [checked]

- 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.

Office: NextGen of Palm Beach County ID: 443

Office Nickname: NextGen of Palm Beach County  
Office Formal Name: NextGen Very Excellent Home Care  
Parent Office:   
Potential Client Base:

Agency License:   
Company ID:   
Business Type:   
DBA:

Time Zone: (UTC-05:00) Eastern Time (US & Can)   
DateEstablished:   
Start Date:   
End Date:

Address Information (POC Return To Address):  
Address 1: 1800 Northernmost Military Tribune Trail  
Address 2: Suite 360  
City: West Delray Beach  
State: FL Postal Code: 33484-1234  
County: Palm Beach  
Country: United States

Pri	Type	Phone No	Note	Tel.	Txt
<input checked="" type="checkbox"/>	Main	(561) 447-7111...		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Fax	(954) 827-0558...		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Mobile	(561) 504-2860...		<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

NextGen of Palm Beach County Medicare

Company Code: Medicare Status: Active  
Type: Medicare ID: 5510 Invoice Delivery Method: Print

Belongs to Office: NextGen of Palm Beach County Office Area:

Office	Tel Ignore Time	Modified On	Modified By	Created On	Created By
NextGen of Palm Beach County	<input checked="" type="checkbox"/>	4/26/2017 4:58 PM	msalokar	4/26/2017 4:58 PM	msalokar



# 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.

Check in recorded  
Client Location Not Provided

GPS Locate and Address Verify the client records

The screenshot shows the 'Address Verification' dialog box with the following details:

- Request:** Address 1: 1800 North Military Trail, Address 2: , City: Boca Raton, State: Florida, Postal Code: 33431, Country: United States, Geo-Type: house, place.
- Suggestion 1:** Address 1: 1800 North Military Trail, Address 2: , City: Boca Raton, State: Florida, Postal Code: 33431, Country: United States, Geo-Type: house, place.
- Buttons:** Accept Location, Override, Select Location and Address, Ok, Cancel.

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

Client List

Office: NextGen of Palm Beach County Status: Active Search

Drag a column header here to group by that column.

		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.

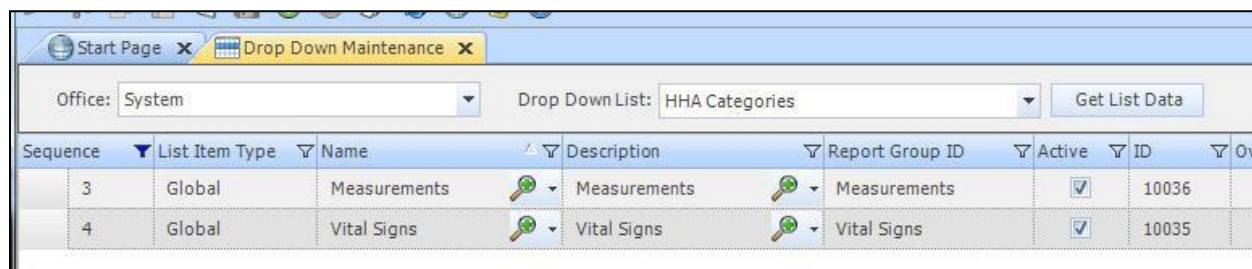
Caregiver Task Name	Description
Fluid Intake	Amount of fluid ingested. Notes can reflect if measured or reported.
Fluid Output	Amount of fluid expelled. Notes can reflect if measured or reported.
Weight	Notes can reflect if measured or reported.
Blood Pressure (TOP)	Systolic Blood Pressure. Normal is 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.



Sequence	List Item Type	Name	Description	Report Group ID	Active	ID	Over
3	Global	Measurements	Measurements	Measurements	<input checked="" type="checkbox"/>	10036	
4	Global	Vital Signs	Vital Signs	Vital Signs	<input checked="" type="checkbox"/>	10035	

## 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	Measurement 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.

Start Page x Client List x 5174, Westmore, J POC: 05/29/2016 x

Intake-1 Intake-2 Program Diagnosis Orders Goals Assessments **Service Plan** Med Profile Schedules MOD Billing

POC ID: 5174 Client: Westmore, Janet Adm ID: 6404 SOC: 12/01/2015 MR#:

Cert. Period: 05/29/2016 - 07/27/2016 Discharged:  CBSA:  HIPPS:

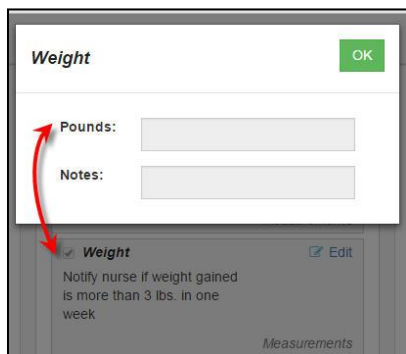
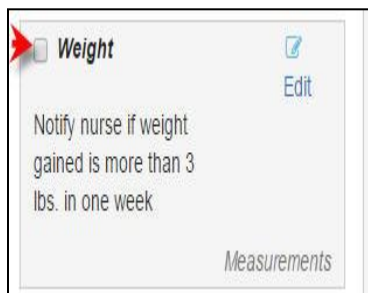
**SERVICE PLAN:**

- Personal Care
- Nutritional Services
- Measurements
  - Fluid Intake ☒
  - Fluid Output ☒
  - Weight ☒ Notify nurse if weight gained is more than 3 lbs. in one week
- Vital Signs
- Meal Preferences

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.

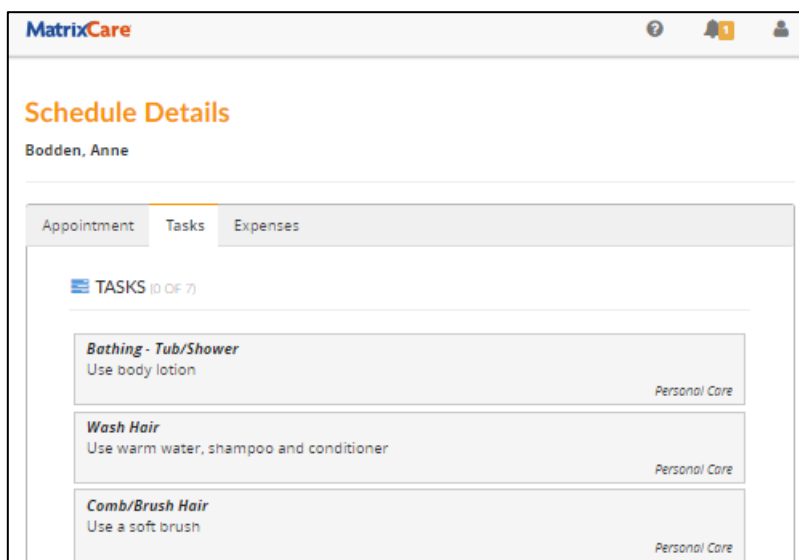


## Plan of Care Records: Service Plan Tasks

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.



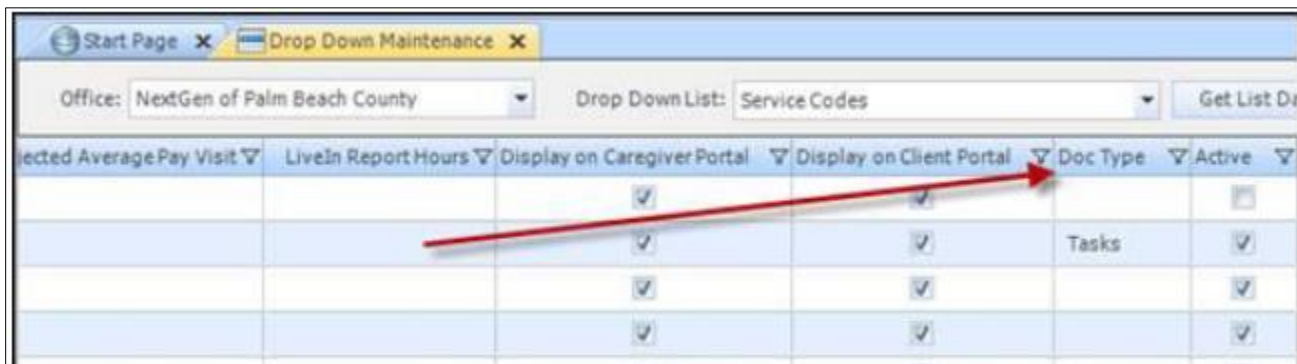
## Setting Up Doc Type Service Codes Categories

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 **Service Codes**.
3. Click **Get List Data**.
4. Scroll all the way to the right to find the Doc Type column.



Selected Average Pay Visit	LiveIn Report Hours	Display on Caregiver Portal	Display on Client Portal	Doc Type	Active
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Tasks	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>



## 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**.

Drop Down Maintenance X						
Office: System		Drop Down List: Schedule Status				
ID	△ ▾	List Item Type ▾	Name ▾		Description ▾	Display on Caregiver Portal ▾
3		Global	C		Completed	<input checked="" type="checkbox"/>
▶ 4		Global	T		Telephony Completed	<input checked="" type="checkbox"/>
19		Global	S		Scheduled	<input checked="" type="checkbox"/>
10004		Global	EN		Caregiver No-Show	<input type="checkbox"/>
10005		Global	ER		Caregiver Refused	<input checked="" type="checkbox"/>
10006		Global	EV		Caregiver on Vacation	<input type="checkbox"/>
10007		Global	EX		Caregiver Cancelled	<input type="checkbox"/>
10010		Global	H		Hold	<input type="checkbox"/>
10011		Global	M		Missed Visit	<input type="checkbox"/>
10014		Global	PH		Client in Hospital	<input checked="" type="checkbox"/>

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.

Pri	Type	Phone No	Note	Tel.	Txt
<input checked="" type="checkbox"/>	Mobile	(561) 421-2333...		<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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".

Text Message:	<input type="text"/>
Email 1:	ccarlin@hotmail.com
Email 2:	<input type="text"/>
<input checked="" type="checkbox"/> 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



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# Back Office User Permissions

The following are permissions used in the back office.

## Mobile Permission Group Assignment Process for On Call Scheduler

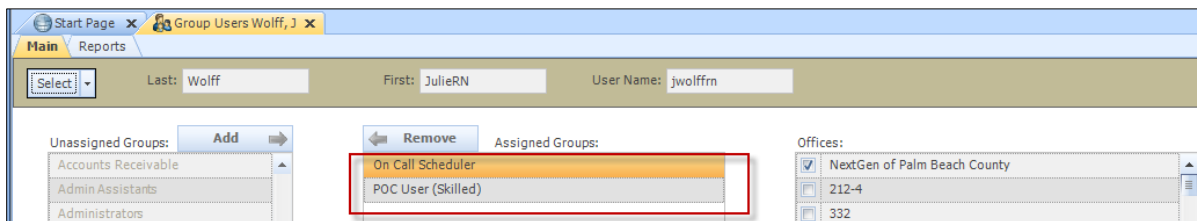
Back Office users can access all clients for their office(s) on a mobile device. The “On Call Scheduler” permission group will allow your Supervisors and Schedulers read access to the client’s mobile record, which includes viewing the client’s schedules, service plans, and forms.

**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.

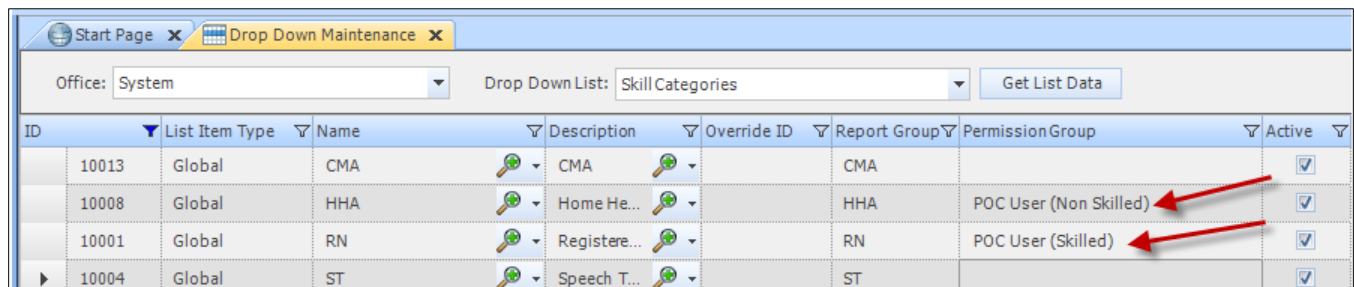
Currently the following permissions groups can be assigned to a skill category:

- 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:

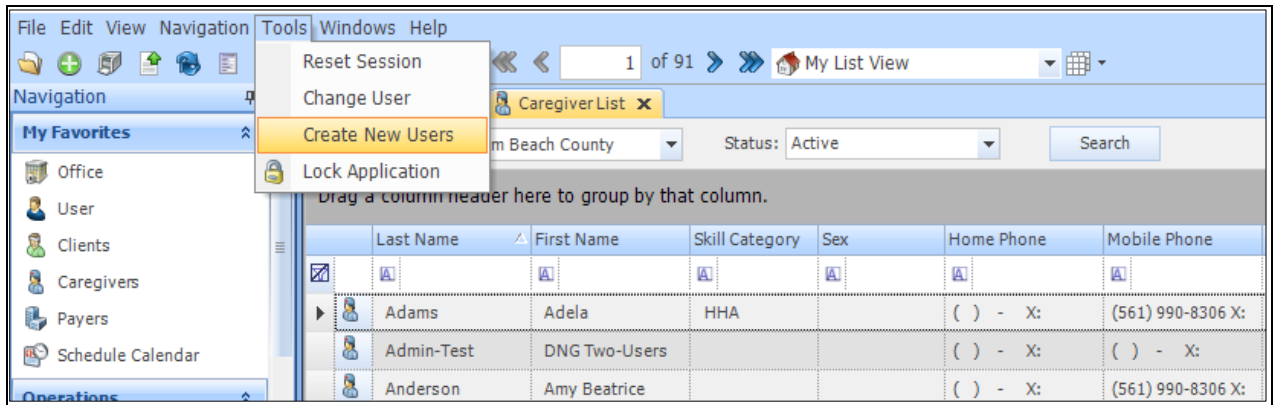
5. From the main menu, click **Navigation, DB Maintenance** then **Drop Down Maintenance**.
6. Select your **Office** and in the Drop Down List select **Skill Categories**.
7. Click **Get List Data**.
8. Find the Permission Group column. Modify and select the appropriate **Permission Group** for the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



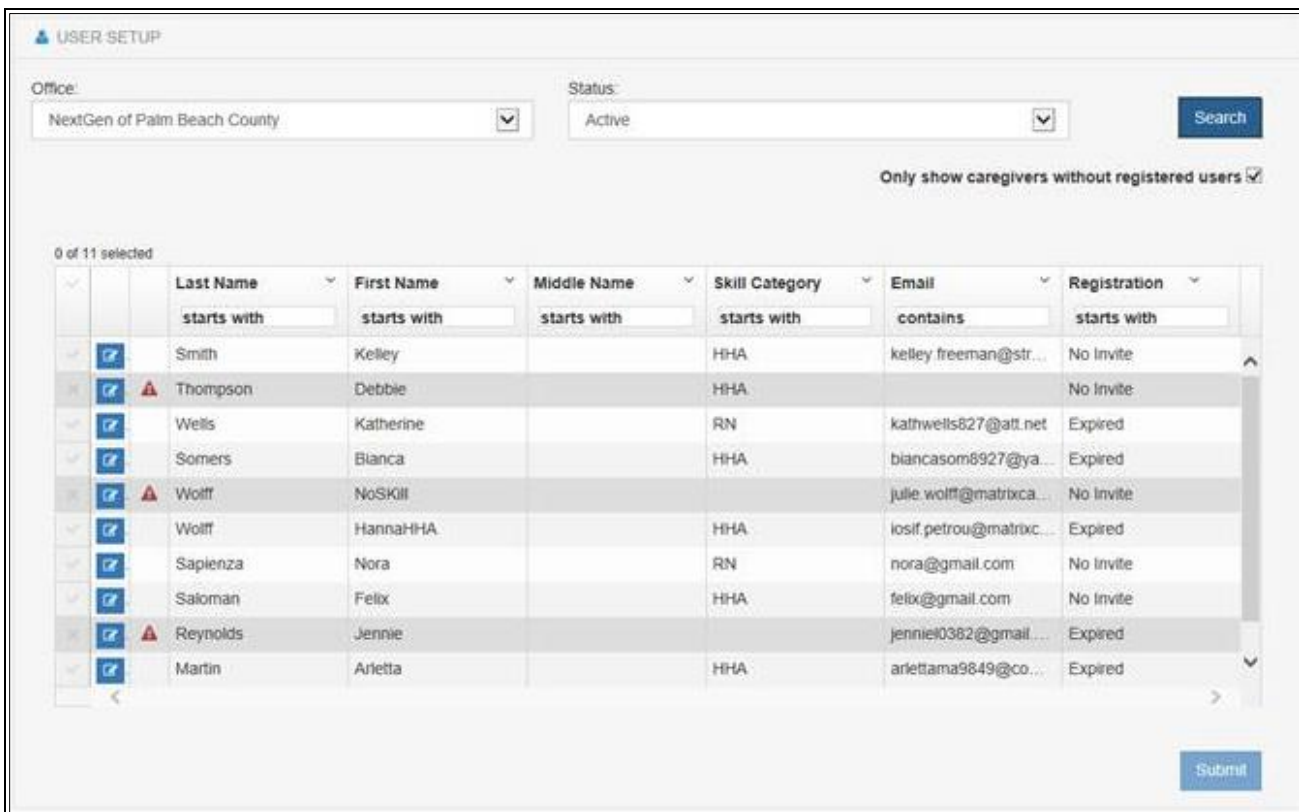
ID	List Item Type	Name	Description	Override ID	Report Group	Permission Group	Active
10013	Global	CMA	CMA		CMA		<input checked="" type="checkbox"/>
10008	Global	HHA	Home He...		HHA	POC User (Non Skilled)	<input checked="" type="checkbox"/>
10001	Global	RN	Registere...		RN	POC User (Skilled)	<input checked="" type="checkbox"/>
10004	Global	ST	Speech T...		ST		<input checked="" type="checkbox"/>

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.

Detail For NoSkill Wolff

Skill Category required

Email:

julie.wolff@matrixcare.com

Phone:

(561) 283-9341 (Mobile)

Skill Category:

Select a Value

Cancel

Save

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.

Detail For NoSkill Wolff

Permission group not assigned to this skill category

Email:

julie.wolff@matrixcare.com

Phone:

(561) 283-9341 (Mobile)

Skill Category:

CMA

Cancel

Save

# 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.

Sch.Start	Sch.End	Office	Sch. Client	Sch. Caregiver	Bill Units	Pay Units	Service Cod	Schedule I	Notes	Telepho	Tel.Status	ClientTel.
10/30/2015 10:15 AM	10/30/2015 11:45 AM	NextGen of P...	Westley, Kathy	Wolff, JulieWeb2	1 Visit	1 Visit	HHA	3196702		5638	5639	20032
10/29/2015 12:00 PM	10/29/2015 12:45 PM	NextGen of P...	Brown, James	Wolff, JulieWeb2	1.5 Hourly	1.5 Hourly	HHA	3197280		5619	5621	20028
10/29/2015 12:40 PM	10/29/2015 12:45 PM	NextGen of P...	Brown, James	Wolff, JulieWeb2	0.08 Ho...	0.08 Hourly	HHA	3196985		5607	5624	20029
10/29/2015 12:40 PM	10/29/2015 12:45 PM	NextGen of P...	Brown, James	Wolff, JulieWeb2	1.5 Hourly	1.5 Hourly	HHA	3233045		5625	5632	20051
10/29/2015 12:40 PM	10/29/2015 12:45 PM	NextGen of P...	Brown, James	Wolff, JulieWeb2	0.08 Ho...	0.08 Hourly	HHA	3233046		5646	5647	20051

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

Sch.Start	Sch.End	Office	Sch. Client	Sch. Caregiver	Bill Units	Pay Units	Service Cod	Schedule I	Notes	Telepho	Tel.Status	ClientTel.
7/7/2016 10:00 AM	7/7/2016 11:30 AM	NextGen of P...	Wellington, Wanda	Wolff, JulieWeb2	1.5 Hourly	1.5 Hourly	HHA	3253439		5593	5594	20373

Notes from the caregiver show in the tool tip area.

Sch.Start	Sch.End	Office	Sch. Client	Sch. Caregiver	Bill Units	Pay Units	Service Cod	Schedule I	Notes	Telepho	Tel.Status	ClientTel.
7/12/2016 2:00 PM	7/12/2016 4:00 PM	NextGen of P...	Wellington, Wanda	Wolff, JulieWeb2	1.5 Hourly	1.5 Hourly	HHA	3253439		5593	5594	20373

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.

ID	Purpose	Caregiver Name	Caregiver	Client Name	P	C	Call Time	Complete	Certified	Notes	Flags	Evil Schedule ID	Office	Hidden	Out
5594	Departure	Wolff, JulieWeb2		Wellington, Wanda			7/7/2016 11:02 AM	TRUE	FALSE	Client was on the floor when I arrived at 10:00am. Checked in after helping her.	Call times not certified by the caregiver.	M	3253439	Beach County	FALSE
5593	Departure	Rusoch, FN		Morokopis, Melanie			7/6/2016 1:42 PM	TRUE	FALSE	I forgot to check out earlier.	Call times not certified by the caregiver.	M	3256165	Beach County	FALSE
5557	Departure	Harper, Hanna		ADD, Margaret			7/6/2016 2:38 PM	TRUE	FALSE	My note	Call times not certified by the caregiver.	M	3307495	Beach County	FALSE
5558	Departure	Shapre, Bonnie PM		Grant, Gerald			7/6/2016 2:30 PM	TRUE	FALSE	My note	Call times not certified by the caregiver.	M	3307445	Beach County	FALSE
5563	Departure	Harper, Hanna		Green, Robert			7/6/2016 2:46 PM	TRUE	FALSE	My note	Call times not certified by the caregiver.	M	3302383	Beach County	FALSE
5561	Departure	Harper, Hanna		Morokopis, Melanie			7/6/2016 3:23 PM	TRUE	FALSE	Notes	Call times not certified by the caregiver.	M	3307505	Beach County	FALSE





Digitally signed by JulieWeb2 Wolff  
Date: 2016.09.09 10:04:24 -04:00  
Reason: Confirm that visit was completed

CAREGIVER SIGNATURE: \_\_\_\_\_ Date: 09/09/2016 10:04 AM

---

OFFICE USE: Check In: 09/09/2016 10:03 AM Check Out: 09/09/2016 10:04 AM

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

Page 1 of 1

Start Page X Office Schedules X

Office Schedules Timeline Expenses Services Reports

Office: NextGen of Palm Beach County From Date: 11/01/2015 To Date: 11/06/2015 Get Schedules

Displaying: 5 Schedules NPD: Pay Date: Auto Save Print

Start Date	Start	Arrival Time	Arrival (Rnd)	End	Dep Time	Departure (Rnd)	Client	Caregiver
Mon 11/02/2015	10:15 AM	1:57 PM	1:55 PM	11:45 AM			Westley, Kathy	Wolff, Julie
Wed 11/04/2015	10:15 AM			11:45 AM			Westley, Kathy	Wolff, Julie
Fri 11/06/2015	10:15 AM			11:45 AM			Westley, Kathy	Wolff, Julie
Tue 11/03/2015	10:15 AM	4:55 PM	4:55 PM	11:45 AM	4:56 PM	4:55 PM	Westley, Kathy	Wolff, Julie
Thu 11/05/2015	10:15 AM	11:13 AM	11:13 AM	11:45 AM	4:50 PM	4:50 PM	Westley, Kathy	Wolff, Julie

Totals

NextGen Home Care  
1800 North Military Trail  
Suite 360  
Boca Raton, FL 33431  
P: (561) 447-7111

Caregiver: Wolff, JulieWeb2 Title: HHA  
Client: Westley, Kathy

**Daily Visit Sheet for 11/05/2015**

Category	Task	Measurement	Notes
<input checked="" type="checkbox"/> Personal Care	Shower		
<input checked="" type="checkbox"/> Personal Care	Dressing		
<input checked="" type="checkbox"/> Personal Care	Oral Hygiene		
<input checked="" type="checkbox"/> Meal Preferences	Breakfast		
<input checked="" type="checkbox"/> Special Equipment	Shower Chair		
<input checked="" type="checkbox"/> Household Duties	Care for Pets		
<input checked="" type="checkbox"/> Measurements	Fluid Intake	6.00 Ounces	
<input checked="" type="checkbox"/> Measurements	Fluid Output		
<input checked="" type="checkbox"/> Measurements	Weight	109.00 Pounds	
<input checked="" type="checkbox"/> Vital Signs	Blood Pressure (Top)		
<input checked="" type="checkbox"/> Vital Signs	Blood Pressure (Bottom)		
<input checked="" type="checkbox"/> Vital Signs	Respirations		
<input checked="" type="checkbox"/> Vital Signs	Pulse		
<input checked="" type="checkbox"/> Vital Signs	Temperature F		
<input checked="" type="checkbox"/> Other	Med Reminder		
<input checked="" type="checkbox"/> Other	Gentle Reminder		

CLIENT SIGNATURE: \_\_\_\_\_ Westley, Kathy Date: 11/05/2015 04:50 PM

CAREGIVER SIGNATURE: \_\_\_\_\_ Date: 11/05/2015 04:50 PM

OFFICE USE: Check In: 11/05/2015 11:13 AM Check Out: 11/05/2015 04:50 PM

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

Page 1 of 1

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

Start Page X Office Schedules X

Office Schedules Timeline Expenses Services Reports

Office: NextGen of Palm Beach County From Date: 11/01/2015 To Date: 11/06/2015 Get Schedules

Displaying: 5 Schedules NPD: Pay Date: Auto Save Print

Start Date	Start	Arrival Time	Arrival (Rnd)	End	Dep Time	Departure (Rnd)	Client	Caregiver
Mon 11/02/2015	10:15 AM	1:57 PM	1:55 PM	11:45 AM			Westley, Kathy	Wolff, Julie
Wed 11/04/2015	10:15 AM			11:45 AM			Westley, Kathy	Wolff, Julie
Fri 11/06/2015	10:15 AM			11:45 AM			Westley, Kathy	Wolff, Julie
Tue 11/03/2015	10:15 AM	4:55 PM	4:55 PM	11:45 AM	4:56 PM	4:55 PM	Westley, Kathy	Wolff, Julie
Thu 11/05/2015	10:15 AM	11:13 AM	11:13 AM	11:45 AM	4:50 PM	4:50 PM	Westley, Kathy	Wolff, Julie

Totals

Main Notes Bill Info Margin Payers Referrals Schedule Info Expenses Pay Adj H1500 Tasks Record Info

Task Notes

Task	Category	Plan	Notes
<input checked="" type="checkbox"/> Shower	Personal Care		
<input checked="" type="checkbox"/> Dressing	Personal Care		
<input checked="" type="checkbox"/> Oral Hygiene	Personal Care		
<input checked="" type="checkbox"/> Breakfast	Meal Preferences		
<input checked="" type="checkbox"/> Care for Pets	Household Duties		
<input checked="" type="checkbox"/> Weight	Measurements		

NextGen Home Care  
1800 North Military Trail  
Suite 360  
Boca Raton, FL 33431  
P: (561) 447-7111

Caregiver: Wolff, JulieWeb2 Title: HHA  
Client: Westley, Kathy

**Daily Visit Sheet for 11/05/2015**

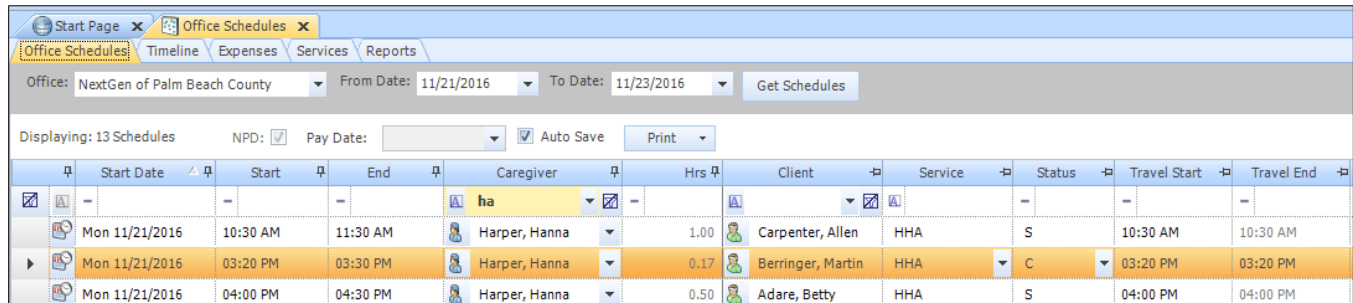
Category	Task	Measurement	Notes
<input checked="" type="checkbox"/> Personal Care	Shower		
<input checked="" type="checkbox"/> Personal Care	Dressing		
<input checked="" type="checkbox"/> Personal Care	Oral Hygiene		
<input checked="" type="checkbox"/> Meal Preferences	Breakfast		
<input checked="" type="checkbox"/> Special Equipment	Shower Chair		
<input checked="" type="checkbox"/> Household Duties	Care for Pets		
<input checked="" type="checkbox"/> Measurements	Fluid Intake	6.00 Ounces	
<input checked="" type="checkbox"/> Measurements	Fluid Output		
<input checked="" type="checkbox"/> Measurements	Weight	109.00 Pounds	
<input checked="" type="checkbox"/> Vital Signs	Blood Pressure (Top)		
<input checked="" type="checkbox"/> Vital Signs	Blood Pressure (Bottom)		
<input checked="" type="checkbox"/> Vital Signs	Respirations		
<input checked="" type="checkbox"/> Vital Signs	Pulse		
<input checked="" type="checkbox"/> Vital Signs	Temperature F		
<input checked="" type="checkbox"/> Other	Med Reminder		
<input checked="" type="checkbox"/> Other	Gentle Reminder		



**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:

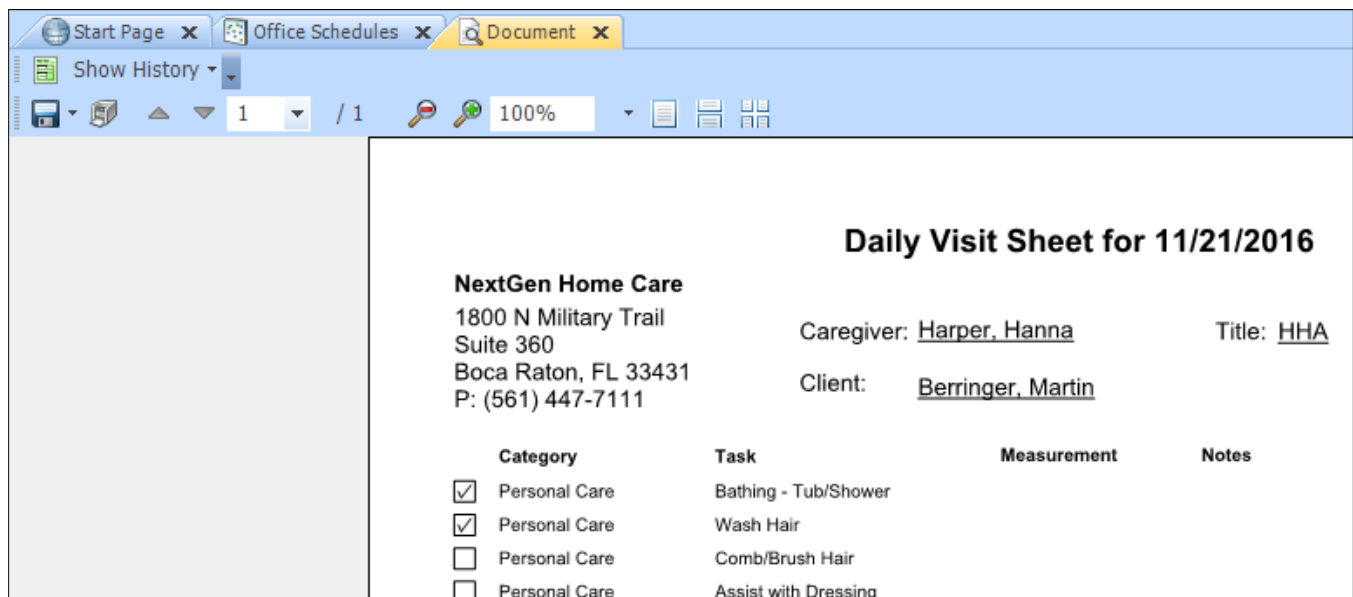
1. On **Office Schedules** tab, select the row for the schedule.



The screenshot shows the 'Office Schedules' tab with a table of schedules. The table has columns for Start Date, Start, End, Caregiver, Hrs, Client, Service, Status, Travel Start, and Travel End. The selected row is for Monday, 11/21/2016, from 03:20 PM to 03:30 PM, with Caregiver Harper, Hanna, Client Berringer, Martin, and Service HHA.

Start Date	Start	End	Caregiver	Hrs	Client	Service	Status	Travel Start	Travel End
Mon 11/21/2016	10:30 AM	11:30 AM	Harper, Hanna	1.00	Carpenter, Allen	HHA	S	10:30 AM	10:30 AM
Mon 11/21/2016	03:20 PM	03:30 PM	Harper, Hanna	0.17	Berringer, Martin	HHA	C	03:20 PM	03:20 PM
Mon 11/21/2016	04:00 PM	04:30 PM	Harper, Hanna	0.50	Adare, Betty	HHA	S	04:00 PM	04:00 PM

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



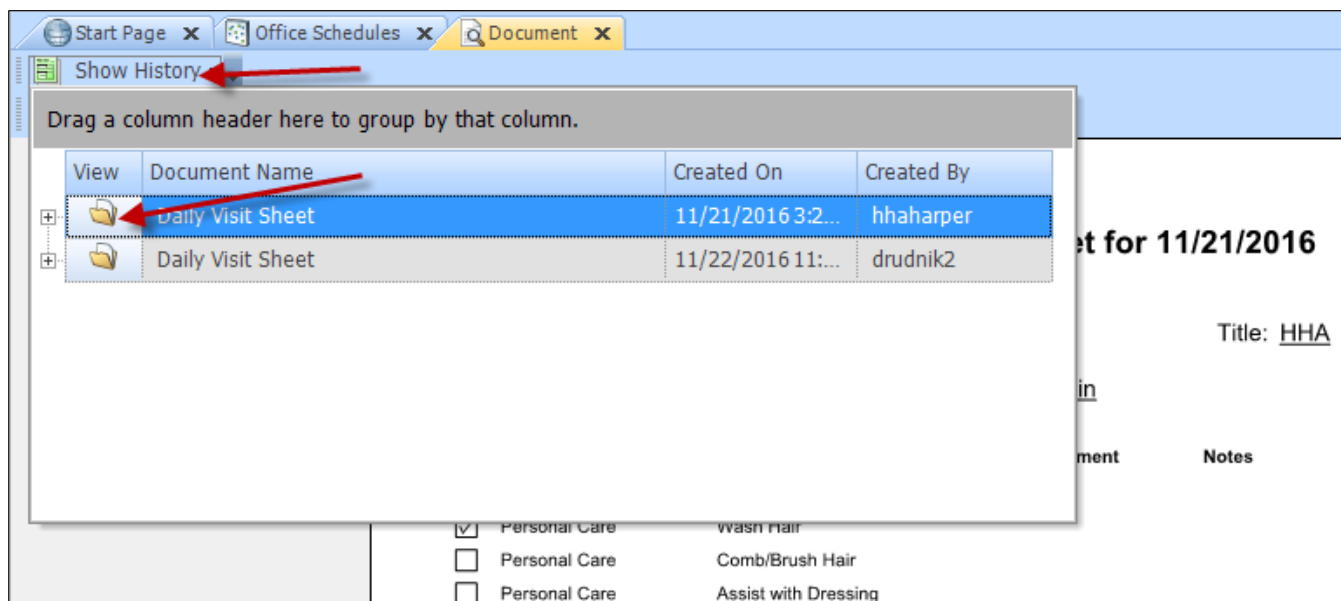
The screenshot shows the 'Show Daily Visit Sheet' form for 11/21/2016. The form includes fields for NextGen Home Care address, Caregiver (Harper, Hanna), Title (HHA), and Client (Berringer, Martin). Below these fields is a table with columns for Category, Task, Measurement, and Notes. The table lists four tasks: Bathing - Tub/Shower, Wash Hair, Comb/Brush Hair, and Assist with Dressing, all under the category 'Personal Care'.

**NextGen Home Care**  
1800 N Military Trail  
Suite 360  
Boca Raton, FL 33431  
P: (561) 447-7111

Caregiver: Harper, Hanna Title: HHA  
Client: Berringer, Martin

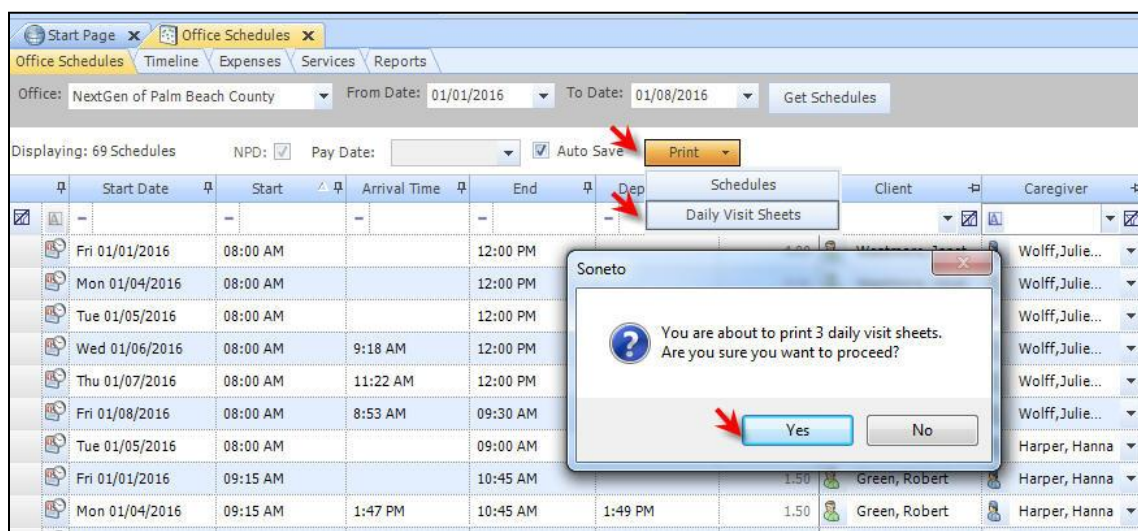
Category	Task	Measurement	Notes
<input checked="" type="checkbox"/> Personal Care	Bathing - Tub/Shower		
<input checked="" type="checkbox"/> Personal Care	Wash Hair		
<input type="checkbox"/> Personal Care	Comb/Brush Hair		
<input type="checkbox"/> Personal Care	Assist with Dressing		

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

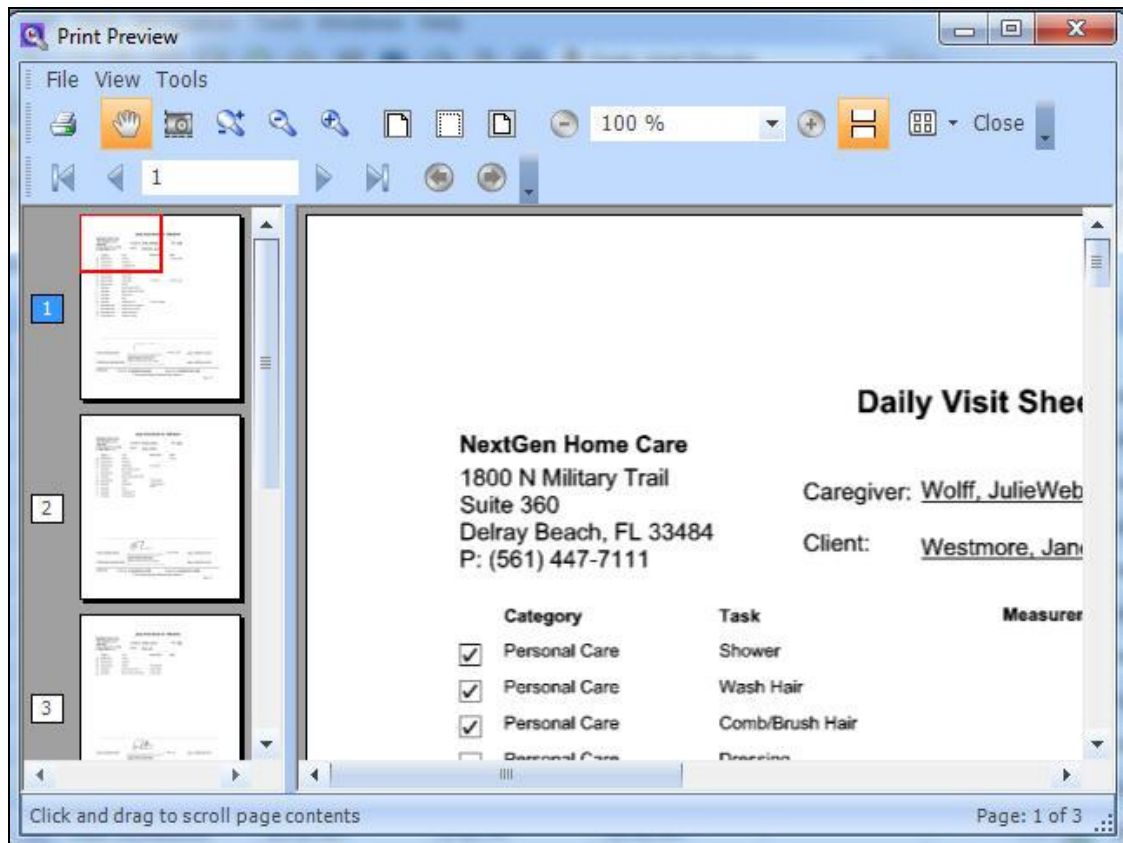


## Office Schedules - View/Print reports for all schedules

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.

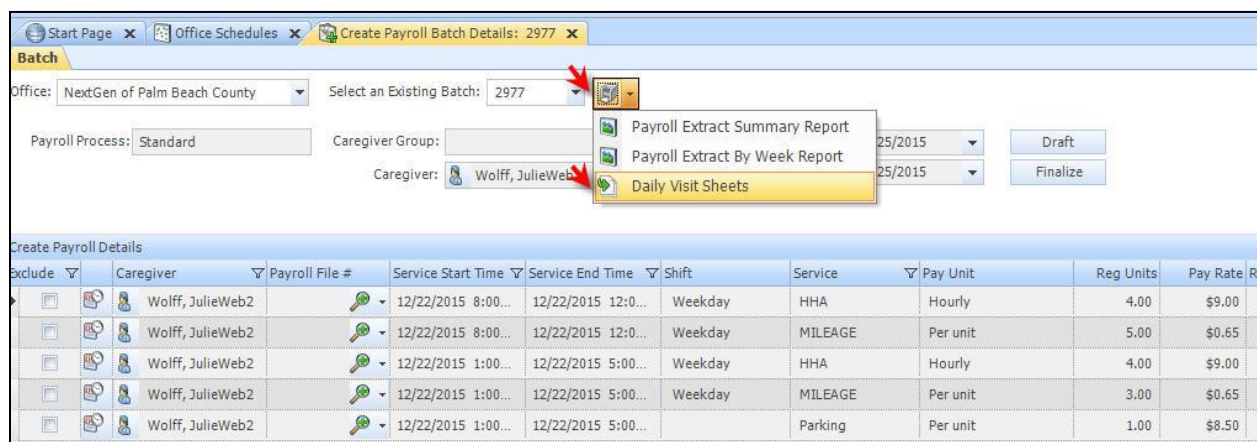


The report viewer opens in a modal that you can drag around on your screen and also minimize and resize. From here you can review and print your Daily Visit Sheet reports.



## 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.

The screenshot shows a web application interface for managing invoice batches. The title bar indicates the current window is 'Draft Invoice Batch 5687'. The main form is divided into several sections:

- Batch Search Criteria:** Includes a dropdown for 'Office' set to 'NextGen of Palm Beach County' and a text field for 'Select an Existing Batch' with the value '5687'. Red arrows point to a toolbar with icons for 'Invoice' and 'Daily Visit Sheets'.
- Batch Settings:** Contains fields for 'Type' (Standard Invoice), 'Start Date' (12/20/2015), 'End Date' (01/08/2016), 'Payer' (Janet Westmore), 'Client' (Westmore, Janet), and 'Invoice Override Date'. There are also buttons for 'Draft', 'Finalize', and 'Errors'. A status message at the bottom of this section reads: 'This batch was last Drafted by jwolff on 01/08/2016 12:14 PM'.
- Invoices Table:** A table with columns: Invoice Date, Client, Payer, Total Amount, From, Through, Email Address, and Inv Delivery Method. It contains one row of data.

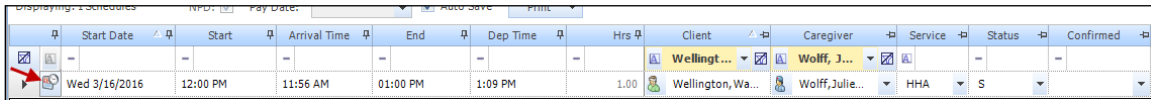
Invoice Date	Client	Payer	Total Amount	From	Through	Email Address	Inv Delivery Method
01/08/2016	Westmore, Janet	Janet Westmore	\$83.25	12/22/2015	12/22/2015		Print

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

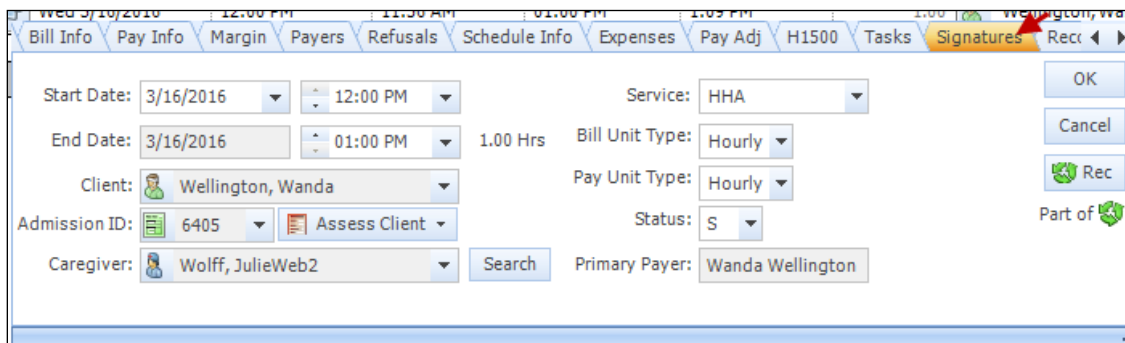
Daily Visit Sheet(s) can also be viewed and printed from the Signatures Tab on an individual schedule. You will need the *rptDailyVisitSheet* permission, and Read access to the *Schedule.Signatures* permission to view and print existing Daily Visit Sheets for the schedule.

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



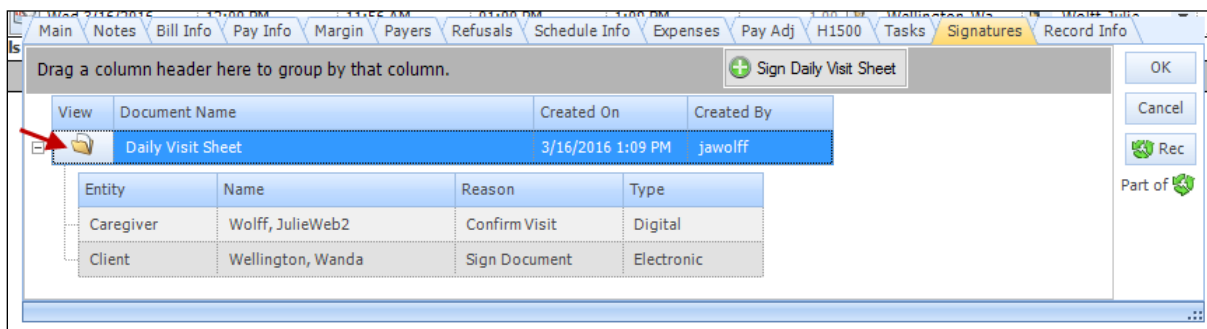
Start Date	Start	Arrival Time	End	Dep Time	Hrs	Client	Caregiver	Service	Status	Confirmed
Wed 3/16/2016	12:00 PM	11:56 AM	01:00 PM	1:09 PM	1.00	Wellington, Wa...	Wolff, Julie...	HHA	S	

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



Start Date: 3/16/2016 12:00 PM Service: HHA OK  
End Date: 3/16/2016 01:00 PM 1.00 Hrs Bill Unit Type: Hourly Cancel  
Client: Wellington, Wanda Pay Unit Type: Hourly Rec  
Admission ID: 6405 Assess Client Status: S Part of  
Caregiver: Wolff, JulieWeb2 Search Primary Payer: Wanda Wellington

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

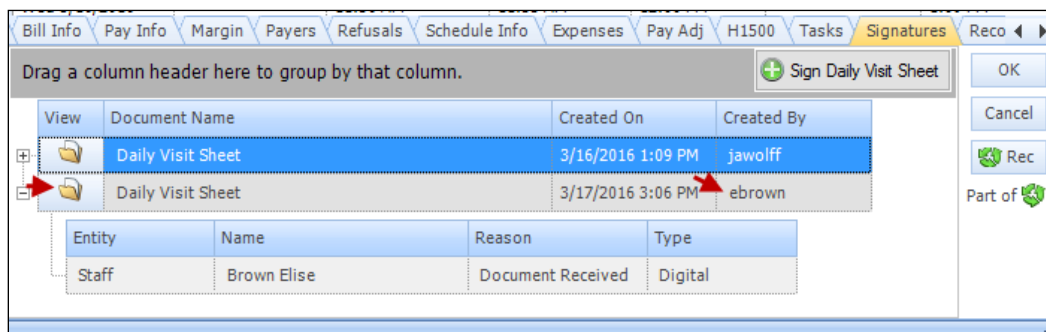


Drag a column header here to group by that column. + Sign Daily Visit Sheet

View	Document Name	Created On	Created By
	Daily Visit Sheet	3/16/2016 1:09 PM	jawolff

Entity	Name	Reason	Type
Caregiver	Wolff, JulieWeb2	Confirm Visit	Digital
Client	Wellington, Wanda	Sign Document	Electronic

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



Drag a column header here to group by that column. + Sign Daily Visit Sheet

View	Document Name	Created On	Created By
	Daily Visit Sheet	3/16/2016 1:09 PM	jawolff
	Daily Visit Sheet	3/17/2016 3:06 PM	ebrown

Entity	Name	Reason	Type
Staff	Brown Elise	Document Received	Digital

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 for 3/16/2016**

**NextGen Home Care**  
 1800 N Military Trail  
 Suite 360  
 Boca Raton, FL 33431  
 P: (561) 447-7111

Caregiver: Wolff, JulieWeb2 Title: HHA  
 Client: Wellington, Wanda

Category	Task	Measurement	Notes
<input checked="" type="checkbox"/> Personal Care	Shower		
<input checked="" type="checkbox"/> Personal Care	Wash Hair		
<input checked="" type="checkbox"/> Personal Care	Comb/Brush Hair		
<input type="checkbox"/> Personal Care	Dressing		

## 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.

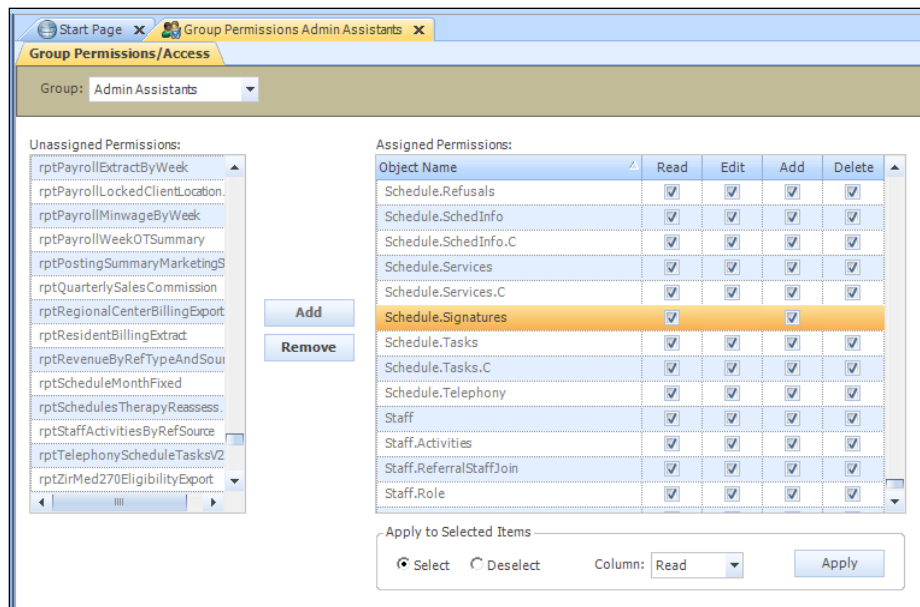
For example, the caregiver provided three personal care tasks but checked off just two of them. In talking with the caregiver and the client, you confirm that all three tasks were performed. You have an agreement with the client that an authorized representative of the agency can sign for the changes.

## 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.



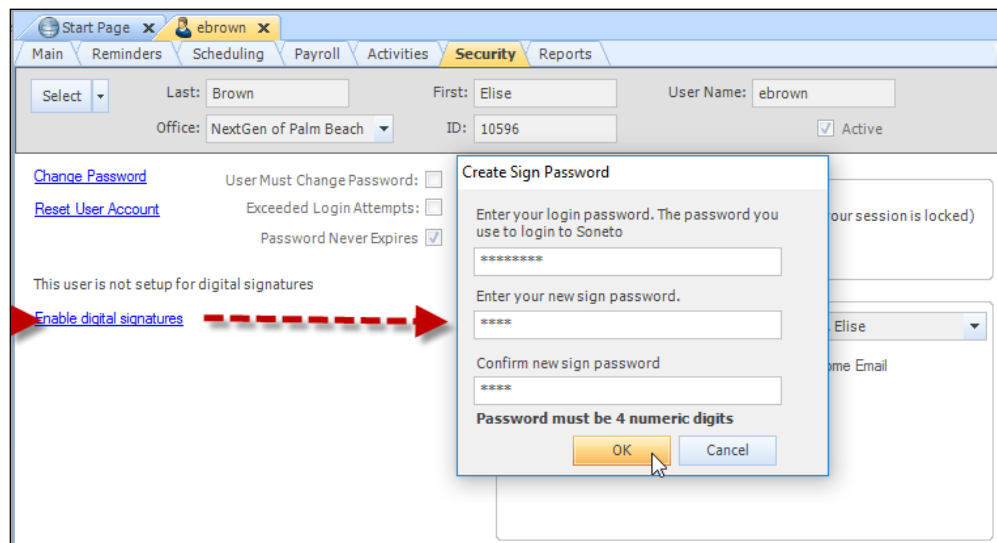


## User Record

### 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.

The screenshot shows the 'Security' tab in the Soneto user management interface. A modal dialog titled 'Create Sign Password' is open, prompting the user to enter their login password, a new sign password, and confirm it. The dialog includes a note: 'Password must be 4 numeric digits'. In the background, the user record for 'Elise Brown' (User Name: ebrown, ID: 10596) is visible, with fields for 'Last', 'First', 'Office', and 'ID'. There are also checkboxes for 'User Must Change Password', 'Exceeded Login Attempts', and 'Password Never Expires'.

## Mapped Entity

You will need a mapped entity on your user record.

This screenshot shows the 'Mapped Entity' section of the user management interface. An arrow points from the 'Change signature password' link in the previous screenshot to this section. The 'Entity Type' is set to 'Caregiver' and the 'Entity' is 'Brown, Elise'. Other settings include 'Edition' (Send Welcome Email), 'Soneto Access: Yes', and 'Soneto Portal Access: No'. The 'Idle Time Lock Minutes' section shows a timer set to 15 minutes. The background shows the same user record for 'Elise Brown'.

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.



**User Profile: Elise Brown**

Last: Brown | First: Elise | Middle: | Status: Active | ID: 13267 | Office: NextGen of Palm Beach Count

---

**Information:**

Internal ID: | Sex: Female | Skill Category: | Title: Administrator | Territory: | Salutation: | Marital Status: | Role: Caregiver/St | Spouse Name: | Nickname: | Race: | Office Area: |

**Address Information:**

Address 1: 111 Boca Raton Blvd | Address 2: | City: Boca Raton | State: FL | Postal Code: 33431 | County: Palm Beach | Country: United States

**Notes:**

**Picture:**

Pri	Type	Phone No	Note	Tel.	Tx
1	Home	(561) 212-3233...			
2	Mobile	(561) 946-7894...			

## 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.

File Edit View Navigation Tools Windows Help

Daily Visit Sheets

Start Page Office Schedules

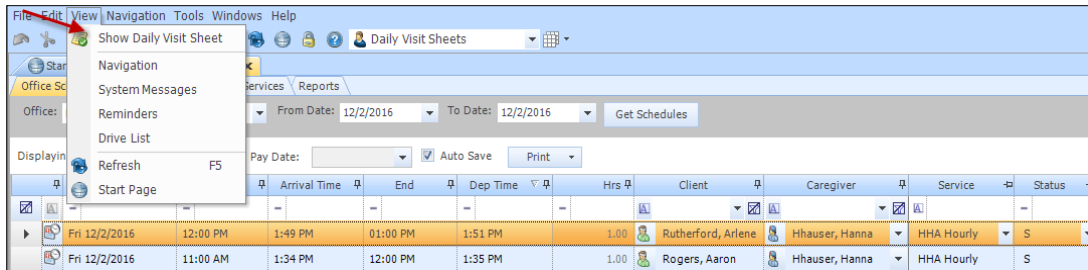
Office Schedules Timeline Expenses Services Reports

Office: NextGen of Palm Beach County From Date: 12/2/2016 To Date: 12/2/2016 Get Schedules

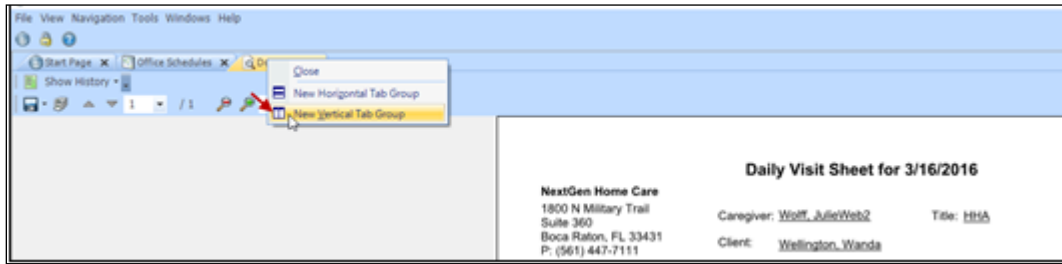
Displaying: 24 Schedules NPD: Pay Date: Auto Save Print

	Start Date	Start	Arrival Time	End	Dep Time	Hrs	Client	Caregiver	Service	Status
Fri 12/2/2016	12:00 PM	1:49 PM	01:00 PM	1:51 PM	1.00	Rutherford, Arlene	Hhauser, Hanna	HHA Hourly	S	
Fri 12/2/2016	11:00 AM	1:34 PM	12:00 PM	1:35 PM	1.00	Rogers, Aaron	Hhauser, Hanna	HHA Hourly	S	
Fri 12/2/2016	10:00 AM	1:29 PM	11:00 AM	1:30 PM	1.00	Rodriguez, Alex	Hhauser, Hanna	HHA Hourly	S	
Fri 12/2/2016	09:00 AM	12:05 PM	10:00 AM	12:06 PM	1.00	Ryan, Timothy	Hhauser, Hanna	HHA Bath Visit	S	

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.



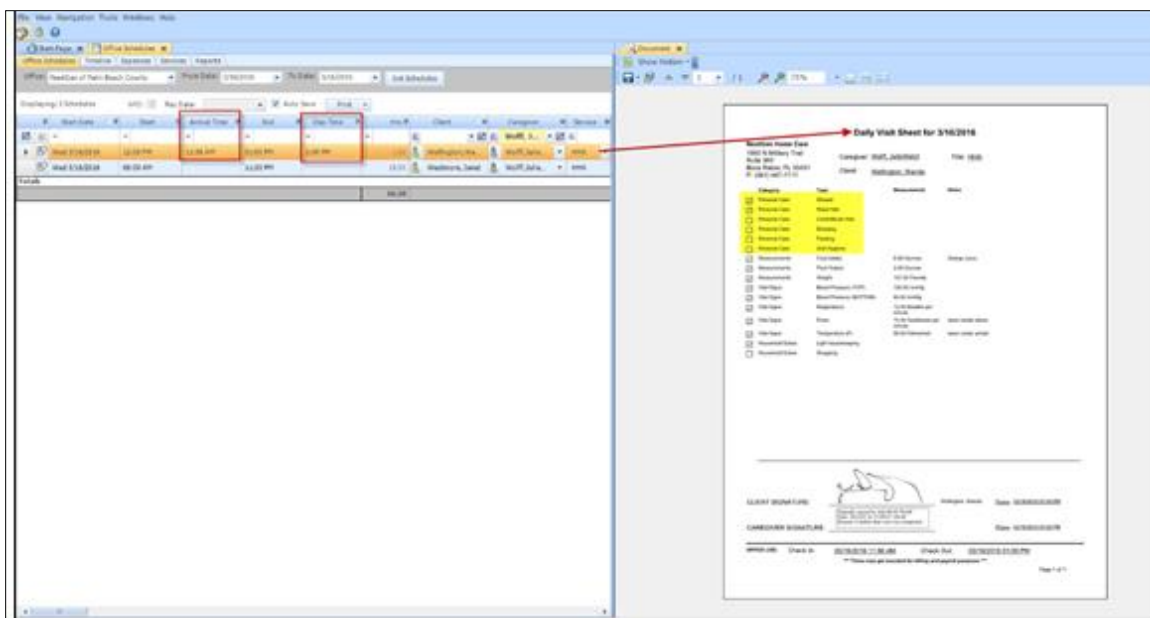
- Right click on the Document Tab and select the **New Vertical Tab Group** option in the menu.



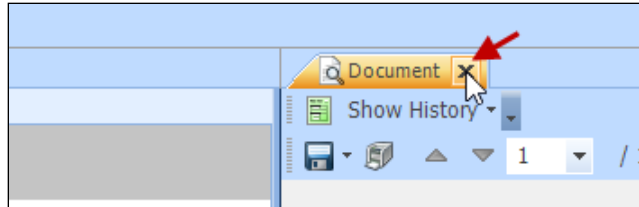
- The Daily Visit Sheet for the selected schedule row will display. Review the existing report for the schedule and determine if it any changes to the visit are needed.

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.



- 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.

Start Date	Start	Arrival Time	End	Dep Time	Hrs	Client	Caregiver	Service	Status	Confirmed
Wed 3/16/2016	12:00 PM	11:56 AM	01:00 PM	1:09 PM	1.00	Wellington, Wa...	Wolff, Julie...	HHA	S	

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

Task	Value	Unit Type	Notes	Category	Tel
<input checked="" type="checkbox"/> Shower				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Wash Hair				Personal Care	<input type="checkbox"/>
<input type="checkbox"/> Comb/Brush Hair				Personal Care	<input type="checkbox"/>
<input type="checkbox"/> Dressing				Personal Care	<input type="checkbox"/>
<input type="checkbox"/> Feeding				Personal Care	<input type="checkbox"/>
<input type="checkbox"/> Oral Hygiene				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Fluid Intake	6.00	Ounces	Orange Juice	Measurements	<input type="checkbox"/>
<input checked="" type="checkbox"/> Fluid Output	2.00	Ounces		Measurements	<input type="checkbox"/>
<input checked="" type="checkbox"/> Weight	107.00	Pounds		Measurements	<input type="checkbox"/>
<input checked="" type="checkbox"/> Blood Pressure...	120.00	mmHg		Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Blood Pressure...	80.00	mmHg		Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Respirations	12.00	Breaths per min...		Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Pulse	75.00	Heartbeats per...	taken inside elbow	Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Temperature (F)	99.00	Fahrenheit	taken under armpit	Vital Signs	<input type="checkbox"/>
<input type="checkbox"/> Light housekee...				Household Duties	<input type="checkbox"/>
<input type="checkbox"/> Shopping				Household Duties	<input type="checkbox"/>

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

Task	Value	Unit Type	Notes	Category	Tel
<input checked="" type="checkbox"/> Shower				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Wash Hair				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Comb/Brush Hair				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Dressing				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Feeding				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Oral Hygiene				Personal Care	<input type="checkbox"/>
<input checked="" type="checkbox"/> Fluid Intake	6.00	Ounces	Orange Juice	Measurements	<input type="checkbox"/>
<input checked="" type="checkbox"/> Fluid Output	2.00	Ounces		Measurements	<input type="checkbox"/>
<input checked="" type="checkbox"/> Weight	107.00	Pounds		Measurements	<input type="checkbox"/>
<input checked="" type="checkbox"/> Blood Pressure...	120.00	mmHg		Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Blood Pressure...	80.00	mmHg		Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Respirations	12.00	Breaths per min...		Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Pulse	75.00	Heartbeats per...	taken inside elbow	Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Temperature (F)	99.00	Fahrenheit	taken under armpit	Vital Signs	<input type="checkbox"/>
<input checked="" type="checkbox"/> Light housekee...				Household Duties	<input type="checkbox"/>
<input type="checkbox"/> Shopping				Household Duties	<input type="checkbox"/>

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

Start Date: 3/16/2016 12:00 PM Service: HHA OK

End Date: 3/16/2016 01:00 PM 1.00 Hrs Bill Unit Type: Hourly Cancel

Client: Wellington, Wanda Pay Unit Type: Hourly Rec

Admission ID: 6405 Assess Client Status: S Part of

Caregiver: Wolff, JulieWeb2 Search Primary Payer: Wanda Wellington

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

Drag a column header here to group by that column. Sign Daily Visit Sheet OK

View	Document Name	Created On	Created By
	Daily Visit Sheet	3/16/2016 1:09 PM	jawolff

Entity	Name	Reason	Type
Caregiver	Wolff, JulieWeb2	Confirm Visit	Digital
Client	Wellington, Wanda	Sign Document	Electronic

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

View	Document Name	Created On	Created By
	Daily Visit Sheet	3/16/2016 1:09 PM	jawolff

Entity	Name	Reason	Type
Caregiver	Wolff, JulieWeb2	Confirm Visit	Digital
Client	Wellington, Wanda	Sign Document	Electronic

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.

**Daily Visit Sheet for 3/16/2016**

NextGen Home Care  
1800 N Military Trail  
Suite 300  
Boca Raton, FL 33431  
P: (561) 447-7111

Caregiver: Wolff, JulieWeb2 Title: WHA  
Client: Wellington, Wanda

Category	Task	Measurement	Note
<input checked="" type="checkbox"/> Personal Care	Bowel		
<input checked="" type="checkbox"/> Personal Care	Wash hair		
<input checked="" type="checkbox"/> Personal Care	Comb/Brush hair		
<input checked="" type="checkbox"/> Personal Care	Dressing		
<input checked="" type="checkbox"/> Personal Care	Feeding		
<input checked="" type="checkbox"/> Personal Care	Oral Hygiene		
<input checked="" type="checkbox"/> Measurements	Pulse rate	6.00 Outlets	Orange Juice
<input checked="" type="checkbox"/> Measurements	Pulse Output	2.00 Outlets	
<input checked="" type="checkbox"/> Measurements	Weight	107.00 Pounds	
<input checked="" type="checkbox"/> Vital Signs	Blood Pressure (TOP)	120.00 mmHg	
<input checked="" type="checkbox"/> Vital Signs	Blood Pressure (BOTTOM)	80.00 mmHg	
<input checked="" type="checkbox"/> Vital Signs	Respirations	12.00 Breaths per minute	
<input checked="" type="checkbox"/> Vital Signs	Pulse	75.00 Heartbeats per minute	Scan inside shoe
<input checked="" type="checkbox"/> Vital Signs	Temperature (F)	98.00 Fahrenheit	Scan under armpit
<input checked="" type="checkbox"/> Household Chores	Light housekeeping		
<input checked="" type="checkbox"/> Household Chores	Shopping		

Authorized Representative's \_\_\_\_\_ Date: 03/16/2016 04:58 PM  
Signature \_\_\_\_\_

OFFICE USE: Schedule Start: 03/16/2016 12:00 PM Schedule End: 03/16/2016 01:00 PM  
-- Times may get rounded for billing and payroll purposes --

Page 1 of 1

< Back Next > Cancel

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**.

Select the document signer(s) below

Entity	Name	Reason	Type
<input checked="" type="checkbox"/> Staff	Brown Elise	Document Received	Digital

< Back Next > Cancel

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

Sign Document

Confirm Document Signature

+ Show Signers

Enter your signature password and click Next to sign the document.

\*\*\*\*

< Back Next > Cancel

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

Sign Document

Document Signed Successfully

Congratulations the document was successfully signed. Click Finish to close this form.

< Back Finish Cancel

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

Bill Info Pay Info Margin Payers Refusals Schedule Info Expenses Pay Adj H1500 Tasks Signatures Reco

Drag a column header here to group by that column.

+ Sign Daily Visit Sheet

View	Document Name	Created On	Created By
	Daily Visit Sheet	3/16/2016 1:09 PM	jawolff
	Daily Visit Sheet	3/17/2016 3:06 PM	ebrown

Entity	Name	Reason	Type
Staff	Brown Elise	Document Received	Digital

OK Cancel Rec Part of

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

Start Page x Office Schedules x Signed Document x

Print

**Daily Visit Sheet for 3/16/2016**

NextGen Home Care  
1800 N Military Trail  
Suite 360  
Boca Raton, FL 33431  
P: (561) 447-7111


Caregiver: Wolff, JulieWeb2 Title: HHA  
Client: Wellington, Wanda

Category	Task	Measurement	Notes
<input checked="" type="checkbox"/> Personal Care	Shower		
<input checked="" type="checkbox"/> Personal Care	Wash Hair		
<input checked="" type="checkbox"/> Personal Care	Comb/Brush Hair		
<input type="checkbox"/> Personal Care	Dress		

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: <u>03/28/2017 01:35 PM</u>
	<div>Digitally signed by JulieWeb2 Wolff Date: 2017.03.28 13:35:29 -04:00 Reason: Confirm that visit was completed</div>		
CAREGIVER SIGNATURE:			Date: <u>03/28/2017 01:35 PM</u>
Signature(s) confirm the checked daily tasks are completed			
OFFICE USE:	Check In:	<u>03/28/2017 01:00 PM</u>	Check Out: <u>03/28/2017 01:35 PM</u>
*** 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  
Client: Wellington, Wanda

Title: HHA

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

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



# 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**.


Select	ID	Status	Client	Description	Caregiver	Extract
<input type="checkbox"/>	10602	READY FOR REVIEW	Mack-Gentry, Theresa	Fall Risk Assessment MAHC 10	Rusch, Rena	
<input type="checkbox"/>	10605	READY FOR REVIEW	Adare, Betty	Skilled Nurse Visit Note	Rusch, Rena	
<input type="checkbox"/>	10606	READY FOR REVIEW	Mack-Gentry, Theresa	Skilled Nurse Visit Note	Rusch, Rena	
<input type="checkbox"/>	10612	READY FOR REVIEW	Adare, Betty	Braden Scale	Rusch, Rena	
<input type="checkbox"/>	10613	READY FOR REVIEW	Bodden, Anne	Comprehensive Adult Assessment (Non OASIS)	RN Salokar, Joe	
<input type="checkbox"/>	10614	READY FOR REVIEW	Bodden, Anne	Supervisory Visits of Home Health Care Staff	RN Salokar, Joe	
<input type="checkbox"/>	10615	READY FOR REVIEW	Bodden, Anne	Home Environment Safety Evaluation	RN Salokar, Joe	
<input type="checkbox"/>	10616	READY FOR REVIEW	Carpenter, Alan	Skilled Nurse Visit Note	Arby, Nurse	

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.

Start Page x Assessment Admin x 10614. Bodden, Anne - 1/12/2018 x Signed Document x

Form(s) All Assessments **Signed Documents**

Drag a column header here to group by that column.

View	Document Name	Created On	Created By
	Supervisory Visits of Home Health Care Staff	1/12/2018 4:34 PM	RNSalokar

Entity	Name	Reason	Type
Caregiver	RN Salokar, Joe	Sign Document	Digital

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

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

## 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?	
<input type="checkbox"/> Yes <input type="checkbox"/> No	

### II. STAFF INFORMATION

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

Person Completing This Form  
RN Salokar, Joe RN

Signature

Digitally signed by Joe RN Smith  
Date: 2017.03.22 14:51:04 -04:00  
Reason: Approve Document

- The back office user can review the signed document and change the process status either on the form or in Assessment Admin.
- To change the status directly on the form, click the hamburger button on the top left of the page.
- 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.

Start Page x 8996. Bodden, Anne - 4/24/2017 x Assessment Admin x

Office: NextGen of Palm Beach County Action: MARK AS READY FOR REVIEW From: To: Search

Drag a column header here to group by that column.

Select	ID	Status	Client	Description	Caregiver
<input checked="" type="checkbox"/>	7516	IN PROGRESS	Abbey, Jay	Medicare SN Assessment (non-OASIS)	
<input checked="" type="checkbox"/>	7562	IN PROGRESS	Wakefield, Kathy	Nursing VisitNote	
<input checked="" type="checkbox"/>	7667	IN PROGRESS	Abbey, Jay	Face to Face for Skilled Home Health Physician A...	
<input checked="" type="checkbox"/>	7775	IN PROGRESS	Ashton, NW	Nursing Supervisory Update	
<input checked="" type="checkbox"/>	7809	IN PROGRESS	Mack-Gentry, Theresa	Face to Face for Skilled Home Health Physician A...	
<input checked="" type="checkbox"/>	7835	IN PROGRESS	Wakefield, Kathy	SN Daily Visit Note	
<input checked="" type="checkbox"/>	7841	IN PROGRESS	Abbey, Jay	Supervisory Visits of Home Health Care Staff	
<input checked="" type="checkbox"/>	7857	IN PROGRESS	Abbey, Jay	Care Coordination Note	

Web enabled assessments cannot be moved from 'In Progress' here. Contact the caregiver assigned to the assessment.

- 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.”

Start Page x Assessment Admin x

Office: NextGen of Palm Beach County Action: MARK AS READY FOR REVIEW From: To: Search

Drag a column header here to group by that column.

Select	ID	Status	Client	Description	Caregiver
<input checked="" type="checkbox"/>	7962	IN PROGRESS	Palmer, Justin...	SN Daily Visit Note	Rusch, Rena
<input checked="" type="checkbox"/>	7963	IN PROGRESS	Palmer, Justin...	SN Daily Visit Note	Rusch, Rena
<input checked="" type="checkbox"/>	7964	IN PROGRESS	Palmer, Justin...	Supervisory Visits of Home Healthcare Staff	Rusch, Rena
<input checked="" type="checkbox"/>	7965	IN PROGRESS	Palmer, Justin...	Supervisory Visits of Home Healthcare Staff	Rusch, Rena
<input checked="" type="checkbox"/>	7966	IN PROGRESS	Palmer, Justin...	Supervisory Visits of Home Healthcare Staff	Rusch, Rena

Functions

Print Error Report Run Selected Action Extract Assessments Print Grid Export To Excel

Reminders Drive List

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 screenshot displays the MatrixCare software interface. The top navigation bar includes tabs for Office Schedules, Timeline, Expenses, Services, and Reports. The main window shows a schedule for 'NextGen of Palm Beach County' with a date range from 2/27/2017 to 2/27/2017. A dropdown menu is open, showing the 'Assess Client' button. The dropdown menu lists various assessment templates, including 'Nursing Visit Note (Complex)', 'Nursing Progress Note', 'Private Duty Non Skilled', 'RN Assessment', 'RN Re-Certification Assessment', 'Supervisory Update', 'Service Plan', 'Basic RN Initial Assessment', 'Basic RN Recert Assessment', 'Client Intake Assessment', 'Client Intake', 'Supervisory Visits of Home Healthcare Staff', 'Home Environment Safety Evaluation', and 'Care Coordination Note'. The 'Care Coordination Note' is selected.

Select	Template Name	Version	Service	Effective From
<input type="checkbox"/>	Nursing Visit Note (Complex)		SN	01/01/2014
<input type="checkbox"/>	Nursing Progress Note			01/01/2013
<b>Private Duty Non Skilled</b>				
<input type="checkbox"/>	RN Assessment		SN	01/01/2014
<input type="checkbox"/>	RN Re-Certification Assessment		SN	01/01/2014
<input type="checkbox"/>	Supervisory Update		SN	01/01/2013
<input type="checkbox"/>	Service Plan		SN	01/01/2014
<input type="checkbox"/>	Basic RN Initial Assessment		SN	01/01/2013
<input type="checkbox"/>	Basic RN Recert Assessment		SN	01/01/2013
<input type="checkbox"/>	Client Intake Assessment			01/01/2014
<input type="checkbox"/>	Client Intake		SN	01/01/2013
<b>Non Medical</b>				
<input type="checkbox"/>	Supervisory Visits of Home Healthcare Staff			01/01/2016
<input type="checkbox"/>	Home Environment Safety Evaluation			01/01/2016
<input checked="" type="checkbox"/>	Care Coordination Note			01/01/2016

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.”

Start Date: 3/3/2017 11:00 AM Service: RN

End Date: 3/3/2017 11:15 AM 0.25 Hrs Bill Unit Type: Hourly

Client: Bodden, Anne Pay Unit Type: Hourly

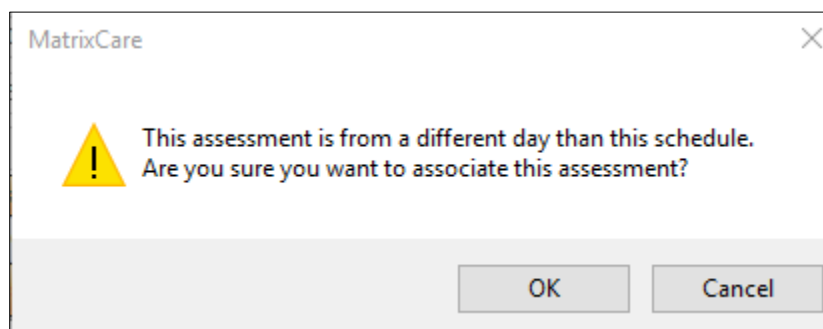
Admission ID: 6580 Assess Client Status: S

Caregiver: RN Salokar, Create Assessment Primary Payer: Anne Bodden

Associate Assessment

03/01/2017 Supervisory Visits of...	Salker, Lisa HHA (S)	Salker, Lisa HHA (S)	Salker, Lisa HHA (S)	Salker, Lisa
02/21/2017 Supervisory Visits of...				
02/20/2017 Supervisory Visits of...				
02/20/2017 Supervisory Visits of Home Healthcare Staff				

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.

Start Date: 3/3/2017 11:00 AM Service: RN

End Date: 3/3/2017 11:15 AM 0.25 Hrs Bill Unit Type: Hourly

Client: Bodden, Anne Pay Unit Type: Hourly

Admission ID: 6580 Assess Client Status: S

Caregiver: RN Salokar, Create Assessment Primary Payer: Anne Bodden

View Assessment

03/01/2017 Supervisory Visits of...	Salker, Lisa HHA (S)	Salker, Lisa HHA (S)	Salker, Lisa HHA (S)	Salker
03/01/2017 Supervisory Visits of Home Healthcare Staff				

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





# 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

The screenshot displays the MatrixCare Home Care Back Office interface. At the top, there is a navigation bar with tabs: Intake-1, Intake-2, Program, Diagnosis, Orders, Goals, Assessments, Service Plan, **Service Plan History** (highlighted), and Med Profile. Below the navigation bar is a form containing patient information: POC ID: 5721, Client: Bodden, Anne, Adm ID: 6580, SOC: 05/17/2016, MR#: (empty), Cert. Period: 3/13/2017 - 5/11/2017, Discharged: (empty), CBSA: 34940, and HIPPS: (empty). Below the form is a table with the following data:

Drag a column header here to group by that column.			
View	Document Name	Created On	Created By
	Published Plan of Care Service Plan Report	11/8/2016 8:46 AM	msalokar

Below the table is a sub-table with the following data:

Entity	Name	Reason	Type
User Settings	Salokar, Michael	Document Received	Digital

# 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.

The screenshot shows the MatrixCare software interface. At the top, there are tabs for 'Schedule Calendar', 'Client List', and 'Bodden, A'. Below these, there are several sub-tabs: 'Main', 'Advanced', 'Contacts', 'PEAQ', 'Statement Options', 'Taxable Area', 'JOI', 'Client Location', 'Home Care Pulse', 'Activities', 'Payers', and 'Admissions'. The 'Admissions' tab is currently selected. Below the tabs, there is a search bar with 'Last: Bodden', 'First: Anne', and 'Suffix:'. There is also a 'Status: Active' dropdown and an 'ID: 20755' field. Below this, there is a table with columns: 'Referral Date', 'Admission ID', 'SOC Date', 'Discharge Date', 'Primary Payer', 'MR Number', 'Office', and 'Cas'. The table has one row with the following data: 'Referral Date' (empty), 'Admission ID' (6580), 'SOC Date' (5/17/2016), 'Discharge Date' (empty), 'Primary Payer' (empty), 'MR Number' (empty), 'Office' (NextGen of Palm Beach County), and 'Cas' (empty). Below the table, there is a button that says 'Add New Plan of Care to Admission ID: 6580'.

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**.

Client List x Bodden, A x 5784. Bodden, A POC: 1/2/2017 x

Intake-1 Intake-2 Program Diagnosis Orders Goals Assessments **Service Plan** Service Plan History Med Profile Schedules

POC ID: 5784 Client: Bodden, Anne Adm ID: 6919 SOC: 11/01/2016 MR#:   
 Cert. Period: 1/2/2017 - 3/2/2017 Discharged: C/SA: 34940 HIPPS:

**Draft Service Plan:**

☐ Personal Care

Bathing - Tub/Shower	<input type="checkbox"/>		
Bed/Sponge Bath	<input type="checkbox"/>		
Wash Hair	<input checked="" type="checkbox"/>	Use conditioner	
Comb/Brush Hair	<input checked="" type="checkbox"/>		
Assist with Dressing	<input checked="" type="checkbox"/>		
Assist with Feeding	<input checked="" type="checkbox"/>		
File/Clean Nails	<input checked="" type="checkbox"/>	Use clear polish	
Oral Hygiene	<input type="checkbox"/>		
Denture Care	<input type="checkbox"/>		
Apply Non Medical Lotion	<input type="checkbox"/>		
Assist with Toileting	<input type="checkbox"/>		
Shower	<input type="checkbox"/>		
Skin Care	<input checked="" type="checkbox"/>	Use unsented lotion	
Turn in Bed	<input type="checkbox"/>		
Other Personal Care	<input type="checkbox"/>		

☐ Nutritional Services

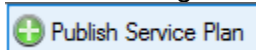
Special Instructions:

Activities:

Other Instructions:

from Plan Of Care ID 5784. MSALOKAR SONETOQA LAN NUM CAPS OVR SCRL

- 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.

Sign Document

Preview the document

Save Print 75 %

### Plan of Care Service Plan

**NextGen Home Care**  
 1800 N Military Trail  
 Suite 360  
 Boca Raton, FL 33431  
 P: (561) 447-7111

Client: Bodden, Anne POC: 05/12/2017-07/10/2017

Category	Task	Plan Notes
<input checked="" type="checkbox"/> Personal Care	Bed/Sponge Bath	
<input checked="" type="checkbox"/> Personal Care	Wash Hair	Use Conditioner
<input checked="" type="checkbox"/> Personal Care	Assist with Dressing	
<input checked="" type="checkbox"/> Personal Care	File/Clean Nails	
<input checked="" type="checkbox"/> Personal Care	Skin Care	
<input checked="" type="checkbox"/> Nutritional Services	Prepare/Serve Lunch	
<input checked="" type="checkbox"/> Nutritional Services	Special Diet	Low sugar intake
<input checked="" type="checkbox"/> Client Abilities	Glasses	Needs eye glasses for reading and signing

< Back Next > Cancel

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

Sign Document

Select the document signer(s) below

	Entity	Name	Reason	Type
<input checked="" type="checkbox"/>	UserSettings	Salokar Michael	Document Received	Digital

< Back Next > Cancel

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

**Sign Document**

**Confirm Document Signature**

☐ Hide Signers

Entity	Name	Reason	Type
User Settings	Salokar Michael	Document Received	Digital

Enter your signature password and click **Next** to sign the document.

< Back    Next >    Cancel

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

**Sign Document**

**Document Signed Successfully**

Congratulations the document was successfully signed. Click **Finish** to close this form.

< Back    Finish    Cancel

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.

Start Page x Client List x Bodden, A x 5738. Bodden, A POC: 5/12/2017 x

Intake-2 Program Diagnosis Orders Goals Assessments Service Plan **Service Plan History** Med Prof

POC ID: 5738 Client: Bodden, Anne Adm ID: 6580 SOC: 05/17/2016 MR#:

Cert. Period: 5/12/2017 - 7/10/2017 Discharged:  CBSA: 34940 HIPPS:

Drag a column header here to group by that column.

View	Document Name	Created On	Created By
	Published Plan of Care Service Plan Report	11/10/2016 4:04...	msalokar

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

Start Page x Client List x Bodden, A x 5738. Bodden, A POC: 5/12/2017 x Signed Document x

Intake-2 Program Diagnosis Orders Goals Assessments Service Plan **Service Plan History** Med Prot

POC ID: 5738 Client: Bodden, Anne Adm ID: 6580 SOC: 05/17/2016 MR#:   
 Cert. Period: 5/12/2017 - 7/10/2017 Discharged: CBSA: 34940 HIPPS:

Drag a column header here to group by that column.

View	Document Name	Created On	Created By
	Published Plan of Care Service Plan Report	11/10/2016 4:04...	msalokar

Entity	Name	Reason	Type
User Settings	Salokar, Michael	Document Received	Digital

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

Client List x Bodden, A x 5784. Bodden, A POC: 1/2/2017 x Signed Document x

1 / 1 60%

**Plan of Care Service Plan**

**NextGen Home Care**  
 1800 N Military Trail  
 Suite 360  
 Boca Raton, FL 33431  
 P: (561) 447-7111

Client: Bodden, Anne POC: 01/02/2017-03/02/2017

Category	Task	Plan Notes
<input checked="" type="checkbox"/> Personal Care	Wash Hair	Use conditioner
<input checked="" type="checkbox"/> Personal Care	Comb/Brush Hair	
<input checked="" type="checkbox"/> Personal Care	Assist with Dressing	
<input checked="" type="checkbox"/> Personal Care	Assist with Feeding	
<input checked="" type="checkbox"/> Personal Care	File/Clean Nails	Use clear polish
<input checked="" type="checkbox"/> Personal Care	Skin Care	Use unscented lotion

SIGNATURE: Salokar, Michael Date: 12/01/2016 03:53 PM

Page 1 of 1

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**.

The screenshot shows a web application interface for creating a user record. The top navigation bar includes tabs like 'Main', 'Scripting', 'Inquiry Notes', 'Infiniti', 'Taxable Area', 'Service Category', 'Home Care Pulse', 'Interview', and 'HCCP'. Below the navigation bar, there's a header section with fields for 'Last: Smith', 'First: Irene', 'Middle:', 'Status: Active', 'ID: 13044', and 'Office: NextGen of Palm Beach Count'. The main form is divided into two columns. The left column, titled 'Information:', contains fields for 'Internal ID:', 'Sex: Female', 'Skill Category: HHA', 'Title: HHA', 'Territory:', 'Salutation:', 'Marital Status:', 'Role: Caregiver/St' (highlighted with a red arrow), 'Spouse Name:', 'Nickname:', 'Race:', and 'Office Area:'. The right column, titled 'Address Information:', contains fields for 'Address 1: 11 Main St', 'Address 2:', 'City: Boca Raton', 'State: FL', 'Postal Code: 33431', 'County: Palm Beach', and 'Country: United States'. At the bottom, there's a 'Notes:' section and a table with columns 'Pri', 'Type', 'Phone No', 'Note', 'Tel.', and 'Tx'. The table has one row with 'Type' as 'Mobile' and 'Phone No' as '(561) 231-2324...'.

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.

The screenshot shows the 'Offices' tab in the user record creation form. The top navigation bar includes tabs like 'HR', 'Payroll', 'Activities', 'Pay Rates', 'Contacts', 'Skill Codes', 'Expirations', 'Training', 'Matching', 'Offices' (highlighted), 'Attachments', and 'Report'. Below the navigation bar, there's a header section with fields for 'Last: Smith', 'First: Irene', 'Middle:', 'Status: Active', 'ID: 13044', and 'Office: NextGen of Palm Beach Count'. The main form has a section titled 'Belongs to Office:' with a dropdown menu showing 'NextGen of Palm Beach County' and an 'Office Area:' dropdown. Below this, there's a table with columns 'Office', 'Wage Chart', 'Payroll File Number', 'Modified On', 'Modified By', and 'Created On'. The table has one row with 'Office' as 'NextGen of Palm Beach County', 'Wage Chart' as '432', 'Modified On' as '10/30/2015 4:15 PM', 'Modified By' as 'jwolff', and 'Created On' as '09/25/2015 10:55...'.

# 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 field select **Caregiver Announcement**. In the Result field select **Posted**. The activity displays on mobile device when the current date falls within the activity dates.

The screenshot shows the 'Activities' tab in the NextGen of Palm Beach County system. The 'Details' section is expanded, showing the following fields:

- Office: NextGen of Palm Beach
- Share Level: Everyone
- Cost: \$0.00
- Start: 5/15/2017 03:09 PM
- End: 5/17/2017 05:00 PM
- Category: Portal
- Type: Caregiver Announcement
- Result: Posted
- Subject: Pick up your new badge
- Notes: (empty)
- Letter: (empty)
- Display On Calendar: ☐

Arrows point to the 'Category' and 'Subject' fields in the details section.

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

The screenshot shows the mobile notifications pop-up with the following notifications:

- 5 Notifications**
- Come out next week for food, fellowship and fun at our Caregiver picnic!**  
When: Saturday, May 6th. 11AM-3PM Where: Robert Moses State Park
- Pick up your new badge** (highlighted with an arrow)
- Cardiac Care Training**  
Scheduled: May 12, 2017
- CPR Certification Expires**  
Expires: May 31, 2017
- Safety & Risk Expires**  
Expires: May 31, 2017



## 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.

Start Page x Office Schedules x Schedule Calendar x Payment Register NextGen of Palm Beach County x Drop Down Maintenance x												
Office: NextGen of Palm Beach County		Drop Down List: Caregiver Date Types		Get List Data								
ID	List Item Type	Name	Description	Override ID	Report Group ID	Warn	Remind	Active	Modified On	Modified By	Created On	Created By
10002	Global	ACLS Exp...			ACLS Expires	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7/31/2008 3:14 PM	jwolff	5/18/2005 12:51 PM	vtdba
10059	Global	Age Speci...			Age Specific Com...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/8/2013 1:14 PM	jwolff	12/13/2005 10:11...	vtdba
10060	Global	Alien Car...			Alien Card Expires	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12/13/2005 10:11...	vtdba	12/13/2005 10:11...	vtdba
10061	Global	Auto Liab...			Auto Liability Ins...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8/11/2008 4:06 PM	jwolff	12/13/2005 10:11...	vtdba
10062	Global	Auto Regi...			Auto Registration...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/28/2011 11:31 AM	jwolff	12/13/2005 10:11...	vtdba

Start Page x

Caregiver List x

RN Salokar, J x

HCCP

VBP

HR

Payroll

Activities

Pay Rates

Contacts

Skill Codes

Expirations

Training

Matching

Offices

Att:

Select

Last: RN Salokar

First: Joe

Middle:

Status: Active

ID: 13771

Office: NextGen of Palm Beach Count

Get Date Types

Date Type	Expiration Date	Notes	Modified On	Modified By	Created On
CPR	10/26/2018		<div><div></div></div> 10/26/2016 3:20 PM	msalokar	10/26/2016
Background Check	10/26/2018		<div><div></div></div> 10/26/2016 3:20 PM	msalokar	10/26/2016
Safety & Risk Expires	5/31/2017		<div><div></div></div> 5/11/2017 12:18 PM	msalokar	5/11/2017
CPR Certification Expires	5/31/2017		<div><div></div></div> 5/11/2017 12:19 PM	msalokar	5/11/2017

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

5 Notifications	
	Come out next week for food, fellowship and fun at our Caregiver picnic! When: Saturday, May 6th. 11AM-3PM Where: Robert Moses State Park
	Pick up your new badge
	Cardiac Care Training Scheduled: May 12, 2017
	CPR Certification Expires Expires: May 31, 2017
	Safety & Risk Expires Expires: May 31, 2017

## 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.

<div> <div>Start Page</div> <div>CaregiverList</div> <div>RN Salokar, J</div> </div> <div> <div>HCCP</div> <div>VBP</div> <div>HR</div> <div>Payroll</div> <div>Activities</div> <div>Pay Rates</div> <div>Contacts</div> <div>Skill Codes</div> <div>Expirations</div> <div>Training</div> <div>Matching</div> <div>Offices</div> <div>Att: ▼</div> </div>										
Select ▼		Last: RN Salokar	First: Joe	Middle:						
		Status: Active ▼	ID: 13771	Office: NextGen of Palm Beach Count						
nt	Name	Type	Completed	Hours	Score	Scheduled	Issued	Returned	Expiration	
	CPR Training	CPR	10/26/2016	4.00	10.00	10/26/2016	10/26/2016		10/26/2018	
	CPR Training	CPR	5/11/2017	4.00	0.00	5/11/2017	5/12/2017		7/1/2018	
	Cardiac Care Tra...	Cardiac Care		4.00	0.00	5/12/2017				

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

5 Notifications	
	Come out next week for food, fellowship and fun at our Caregiver picnic! <i>When: Saturday, May 6th. 11AM-3PM Where: Robert Moses State Park</i>
	Pick up your new badge
	Cardiac Care Training <i>Scheduled: May 12, 2017</i>
	CPR Certification Expires <i>Expires: May 31, 2017</i>
	Safety & Risk Expires <i>Expires: May 31, 2017</i>

## 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.

The screenshot shows the MatrixCare Home Care Back Office interface. The top navigation bar includes tabs for Start Page, Caregiver List, Smith, I, and ismith. Below this, the Security tab is selected. The main form displays user details: Last: Smith, First: Irene, User Name: ismith (highlighted with an arrow), Office: NextGen of Palm Beach, ID: 10729, and a checked Active checkbox. Below the main form, there are sections for User Configuration (Working Office: NextGen of Palm Beach County) and Address Information (Address 1:).

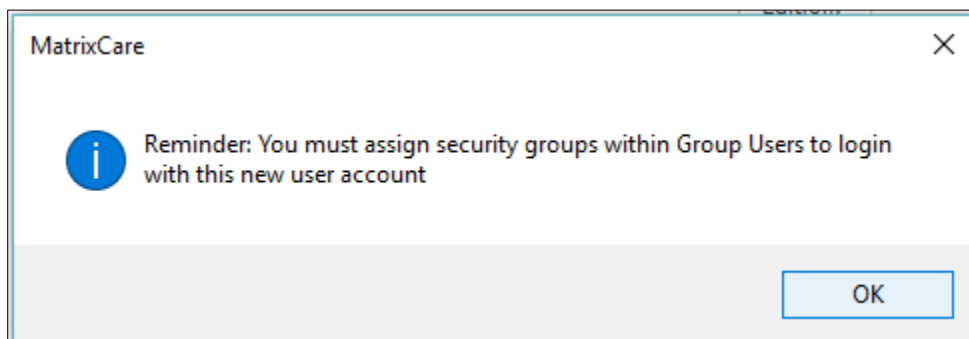
On the Security Tab, leave the **User Must Change Password** box checked once the record is saved. The Create User Password pop-up displays. Enter a new password, confirm the password and click **OK**.

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.

The screenshot shows the MatrixCare Home Care Back Office interface with the Security tab selected. The main form displays user details: Last: Smith, First: Irene, User Name: ismith, Office: NextGen of Palm Beach, ID: 0, and a checked Active checkbox. Below the main form, there are sections for Change Password, Reset User Account, User Must Change Password (checked), Exceeded Login Attempts (unchecked), Password Never Expires (unchecked), Idle Time Lock Minutes (Timer: 5), This User Maps To (Entity Type: Caregiver, Edition: , Send Welcome Email), Soneto Access: No, and Soneto Portal Access: No. A 'Create User Password' pop-up dialog is displayed, prompting for a New Password and Confirm New Password, with an Exceeded Login Attempts checkbox and OK/Cancel buttons.

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.

A screenshot of the MatrixCare user management interface. The top navigation bar includes "Start Page", "ismith", and tabs for "Main", "Reminders", "Scheduling", "Payroll", "Activities", "Security" (highlighted), and "Reports". Below the navigation bar, user details are shown: "Last: Smith", "First: Irene", "User Name: ismith", "Office: NextGen of Palm Beach", "ID: 10537", and an "Active" checkbox. On the left, there are links for "Change Password" and "Reset User Account", and checkboxes for "User Must Change Password" (checked), "Exceeded Login Attempts" (unchecked), and "Password Never Expires" (unchecked). A message states "This user is not setup for digital signatures". On the right, the "Idle Time Lock Minutes" section shows a "Timer" set to 5 minutes. Below this, the "This User Maps To:" section has a red arrow pointing to the "Entity Type" dropdown, which is set to "Caregiver". Another red arrow points to the "Name Search Editor" dropdown, which shows "Smith, Irene". Below these are "Edition:" (blank) and "Send Welcome Email" (checked). At the bottom, "Soneto Access: Yes" and "Soneto Portal Access: No" are listed.

## 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.

The screenshot shows the 'Group Permissions/Access' window for the 'POC User (Non Skilled)' group. It features two main sections: 'Unassigned Permissions' on the left and 'Assigned Permissions' on the right. The 'Unassigned Permissions' list includes items like '485.Management', '485.Revert To Draft', 'AcctExtract', and various 'ActivityShareLevel' items. The 'Assigned Permissions' table lists objects with their respective permissions (Read, Edit, Add, Delete). Below the lists are 'Add' and 'Remove' buttons. At the bottom, there are controls for 'Apply to Selected Items', including 'Select', 'Deselect', a 'Column' dropdown set to 'Read', and an 'Apply' button.

Object Name	Read	Edit	Add	Delete
MyCaregiver.Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Schedule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Schedule.Expenses	<input checked="" type="checkbox"/>			

## 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.

The screenshot shows the 'MatrixCare' interface for 'Schedule Details' for 'Bodden, Anne'. It has tabs for 'Appointment', 'Tasks', and 'Expenses'. The 'Expenses' tab is active, showing a 'MILEAGE' section with a text input field containing '0' and a 'Miles' label. A 'Save' button is at the bottom right.

## 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.

The screenshot shows the 'Group Permissions/Access' window for the 'POC User (Skilled)' group. The 'Group' dropdown is set to 'POC User (Skilled)'. The interface is divided into two main sections: 'Unassigned Permissions' and 'Assigned Permissions'.

**Unassigned Permissions:**

- PlanOfCare.Order
- PlanOfCare.PPS
- PlanOfCare.PPSF2FOVERRIDE
- PlanOfCare.Program
- PlanOfCare.Reports
- PlanOfCare.ServicePlans
- PlanOfCare.tst
- PlanOfCare.UB04
- QuickNote
- QuickNote.Reports
- Referral.ReferralJoin
- ReferralContact
- ReferralContact.Activities
- ReferralContact.Document

**Assigned Permissions:**

Object Name	Read	Edit	Add	Delete
Admission.Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assessment.ReadyForReview				
Assessment.RevertToInProgress				
Client.Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client.InpatientTracking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client.Payers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My.Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Admission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients.Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients.Schedules	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyCaregiver.Clients.ServicePlan	<input checked="" type="checkbox"/>			
MyCaregiver.Schedule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Apply to Selected Items:**

☒ Select ☐ Deselect Column: **Read** **Apply**

## 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.

The screenshot shows the 'Group Users' window for the user 'Smith, Irene' (User Name: ismith). The interface includes a search bar with 'Last: Smith', 'First: Irene', and 'User Name: ismith'. Below the search bar, there are two main sections: 'Unassigned Groups' and 'Assigned Groups'.

**Unassigned Groups:**

- Payroll Assistant
- Period CloseJob
- Plan of Care Service Plan History
- POC User (Skilled)

**Assigned Groups:**

- POC User (Non Skilled)

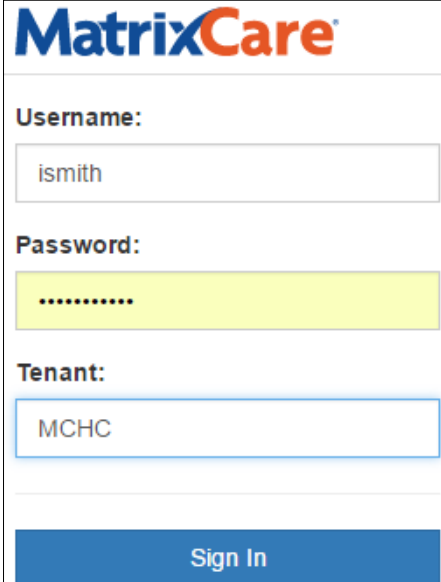
**Offices:**

- ☒ NextGen of Palm Beach County
- ☐ 212-4
- ☐ 332
- ☐ 517

## 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.



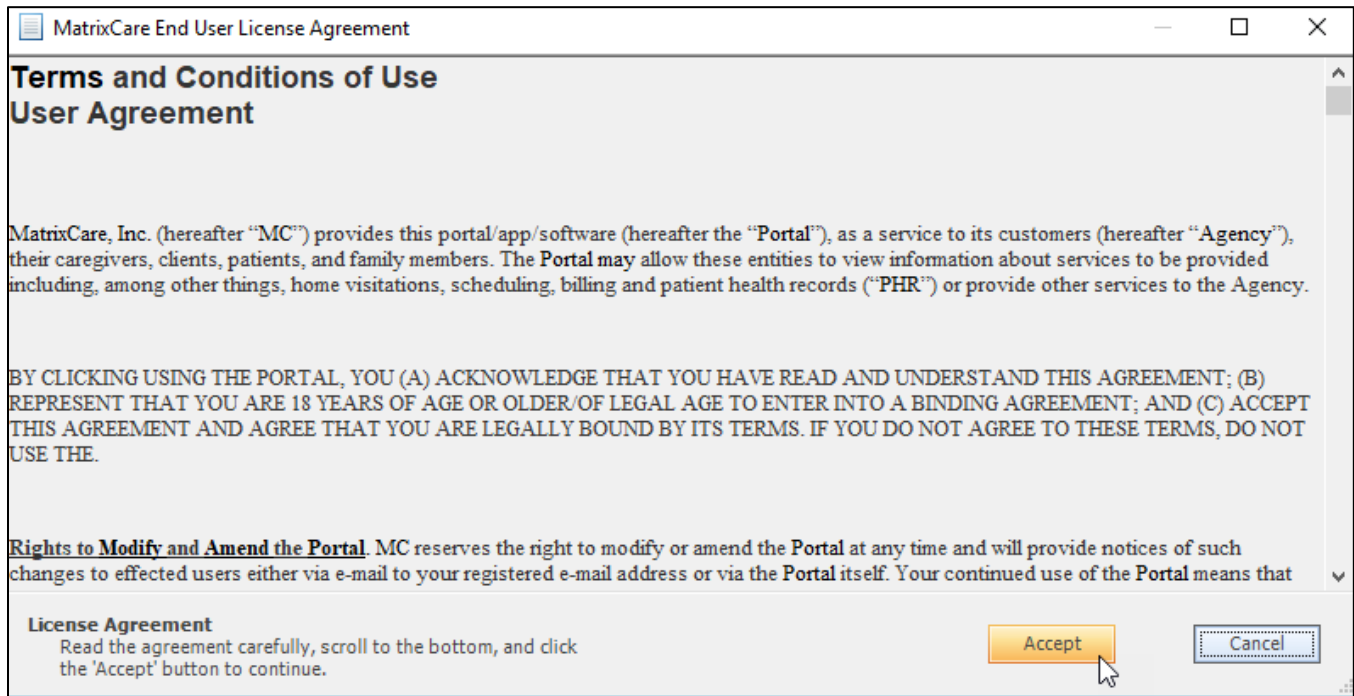
The login form for MatrixCare Home Care Mobile. It features the MatrixCare logo at the top. Below the logo are three input fields: 'Username:' with the value 'ismith', 'Password:' with masked characters '.....', and 'Tenant:' with the value 'MCHC'. A blue 'Sign In' button is located at the bottom right of the form.



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.



The screenshot shows a web browser window titled "MatrixCare End User License Agreement". The main heading is "Terms and Conditions of Use User Agreement". The text describes the service provided by MatrixCare, Inc. (MC) to its customers (Agency), including home visits, scheduling, billing, and patient health records (PHR). It states that by using the Portal, the user acknowledges and agrees to the terms. At the bottom, there is a section titled "License Agreement" with instructions to read the agreement carefully and click the 'Accept' button to continue. There are two buttons: "Accept" (orange) and "Cancel" (blue). A mouse cursor is pointing at the "Accept" button.

MatrixCare, Inc. (hereafter "MC") provides this portal/app/software (hereafter the "Portal"), as a service to its customers (hereafter "Agency"), their caregivers, clients, patients, and family members. The Portal may allow these entities to view information about services to be provided including, among other things, home visitations, scheduling, billing and patient health records ("PHR") or provide other services to the Agency.

BY CLICKING USING THE PORTAL, YOU (A) ACKNOWLEDGE THAT YOU HAVE READ AND UNDERSTAND THIS AGREEMENT; (B) REPRESENT THAT YOU ARE 18 YEARS OF AGE OR OLDER/OF LEGAL AGE TO ENTER INTO A BINDING AGREEMENT; AND (C) ACCEPT THIS AGREEMENT AND AGREE THAT YOU ARE LEGALLY BOUND BY ITS TERMS. IF YOU DO NOT AGREE TO THESE TERMS, DO NOT USE THE.

**Rights to Modify and Amend the Portal.** MC reserves the right to modify or amend the Portal at any time and will provide notices of such changes to effected users either via e-mail to your registered e-mail address or via the Portal itself. Your continued use of the Portal means that

**License Agreement**  
Read the agreement carefully, scroll to the bottom, and click the 'Accept' button to continue.

Accept Cancel



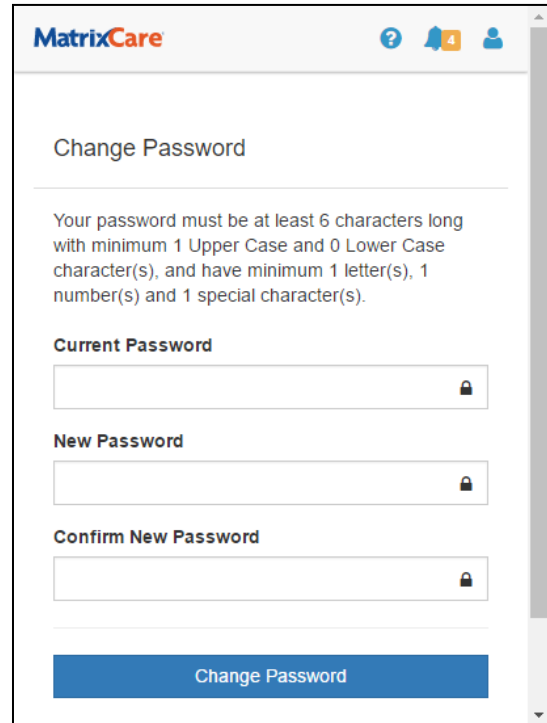
# Change Password

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.

A screenshot of the MatrixCare mobile application's 'Change Password' screen. The header shows the 'MatrixCare' logo on the left and three icons (help, notifications, and user profile) on the right. The main title 'Change Password' is centered. Below it, a password policy message states: '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)'. There are three input fields: 'Current Password', 'New Password', and 'Confirm New Password', each with a lock icon on the right. At the bottom is a blue button labeled 'Change Password'.

## Creating the Mobile Signature PIN

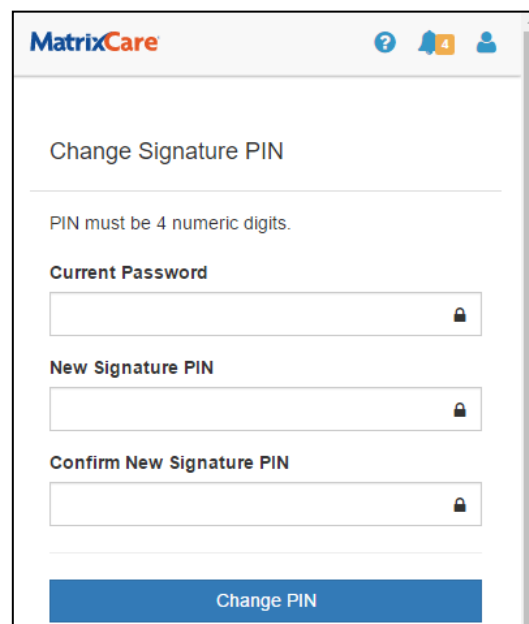
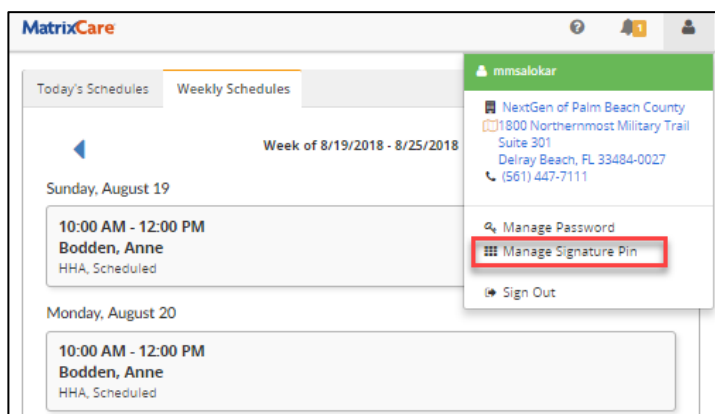
Creating a mobile digital signature PIN is not required, but it is highly recommended the caregiver do this as soon as possible. Do not wait until first check out to sign in for the first time and then have to stop and go back and set the digital signature PIN.

To Create the digital signature PIN:

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

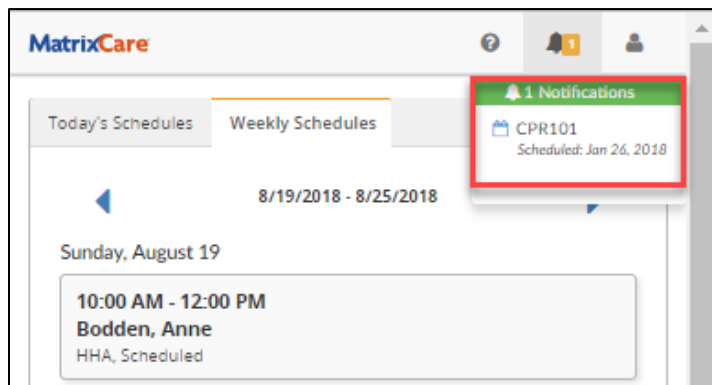
The Change Signature PIN page will display. The caregiver will enter their current password and then will enter a PIN and confirm it by entering it again.

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.

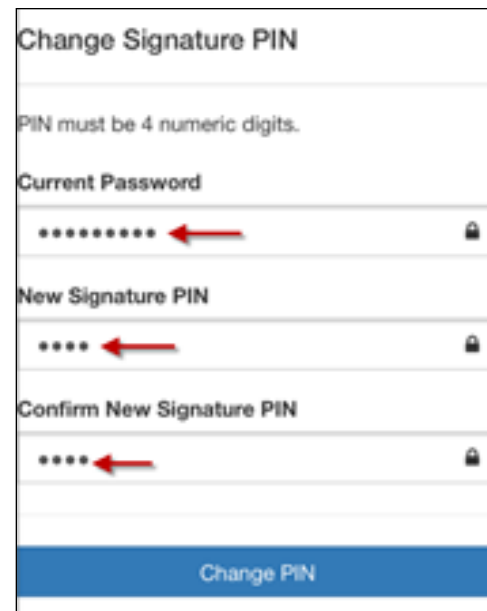


To create or change your Signature Pin:

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.

Start Page x Group Permissions Admin Assistants x

Group Permissions/Access

Group: Admin Assistants

Unassigned Permissions:

- ActivityShareLevel.OfficeManager
- ActivityShareLevel.Administrator
- ActivityShareLevel.Bookkeeper
- ActivityShareLevel.Collections
- ActivityShareLevel.HR
- ActivityShareLevel.jabbott
- ActivityShareLevel.Marketing
- ActivityShareLevel.Medical
- ActivityShareLevel.Recruiters
- AddressBook.Activities.jabbott
- AddressBook.Test
- AddressBook.tst
- Admin.Layout
- Admission.Admission.Test

Add

Remove

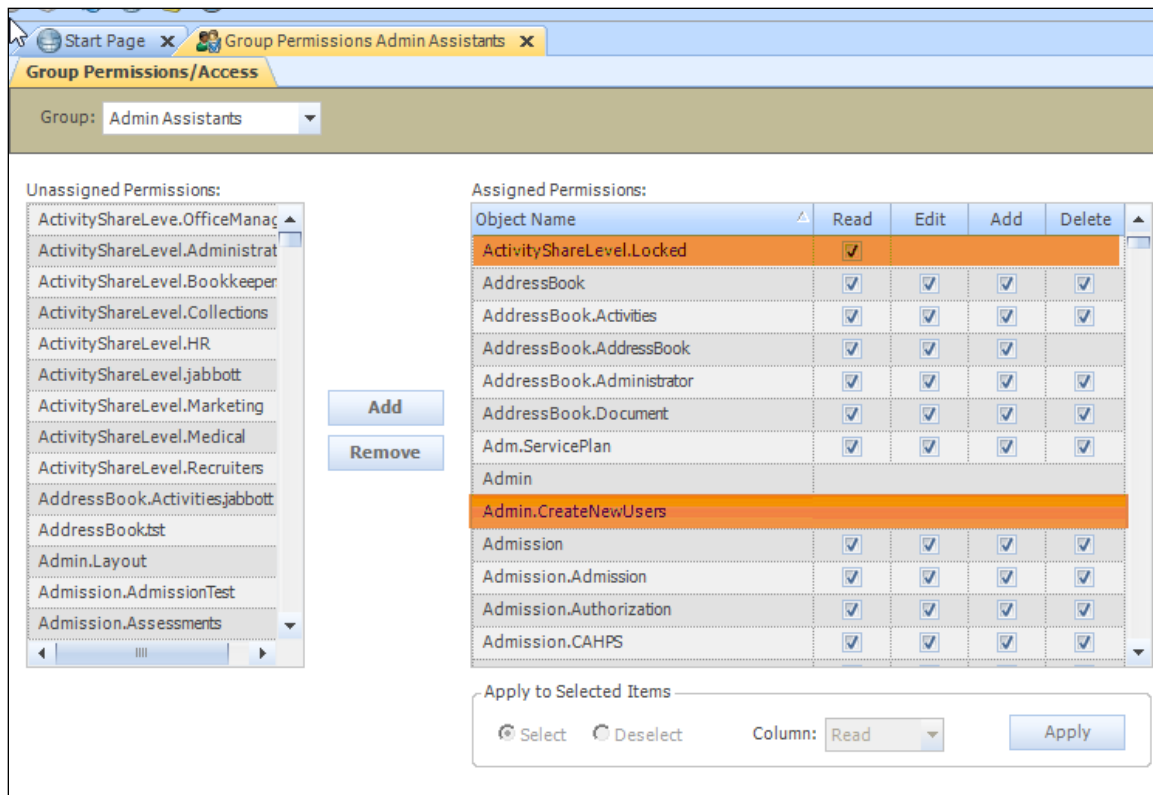
Assigned Permissions:

Object Name	Read	Edit	Add	Delete
Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Availability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing.Closing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing.Closing.Cancel				
Caregiver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.Activities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.Attributes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.Document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.Expirations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.HR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Caregiver.List	<input checked="" type="checkbox"/>			
Caregiver.Matching	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Apply to Selected Items

Select Deselect Column: Read Apply

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.

	Last Name	First Name	User Mapped	Skill Category	Mobile Phone	Email
▶	Adams	Adela	<input checked="" type="checkbox"/>	HHA	(561) 990-8306 X:	diana@stratisinc.com
	Anderson	Amy Beatrice	<input checked="" type="checkbox"/>		(561) 990-8306 X:	diana@stratisinc.com
	Barto	Ginny	<input checked="" type="checkbox"/>	RN	(561) 447-8888 X:	
	Baylor	James	<input checked="" type="checkbox"/>	RN	(561) 990-8306 X:	diana.rudnik@matrixcare.com
	Brannew	Nursh	<input type="checkbox"/>	RN	(860) 759-4554 X:	nate.suver@matrixcare.com
	Branton	Jena	<input checked="" type="checkbox"/>	HHA	(561) 255-1234 X:	device@stratisinc.com

- **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.

	Last Name	First Name	User Mapped	Address Verified	GPS Located	Mobile Phone	Email	Skill Category
▶	Wolff	Judith	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(561) 283-9341 X:	julie.wolff@stratisinc.com	HHA
	Wolff	Julie	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(561) 283-9341 X:	julie.wolff@stratisinc.com	HHA

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.

File Edit View Navigation Tools Windows Help

Start Page x Caregiver List x Wolff, J x

Main Scripting Inquiry Notes Infiniti Taxable Area Service Category Home Care Pulse Interview HCCP HR Pa

Wolff, Judith 5612312333 First: Judith Middle: Margaret

Status: Active ID: 13259 Office: NextGen of Palm Beach Count

Information:

Internal ID: Sex: Female

Skill Category: HHA Title: HHA

Territory: Salutation:

Marital Status: Single Role: Caregiver

Spouse Name: Nickname:

Race:

Office Area:

Address Information:

Address 1: 111 Main Blvd

Address 2: Bldg. D, Apt 12

City: Boynton Beach

State: FL Postal Code: 33435

County: Palm Beach

Country: United States

Notes:

Picture:

No picture on file

Type	Phone No	Note	Tel.	Txt
Home	(561) 231-2333...			
Mobile	(561) 283-9341...			
Mobile	(566) 234-9898...			

Text Message:

Email 1: julie.wolff@stratisinc.com

Email 2:

☒ Allow Soneto to Email This Caregiver

## Create New Users

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

File Edit View Navigation Tools Windows Help

Reset Session

Change User

Create New Users

Lock Application

Drag a column header here to group by that column:

Last Name	First Name	User Mapped	Address Verified	GPS Located	Mobile Phone	Email
Wolff	Judith				(561) 283-9341 X:	julie.wolff@stratisinc.com
Wolff	Julie				(561) 283-9341 X:	julie.wolff@stratisinc.com

**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.

MatrixCare

USER SETUP

Office: Michael's Office Status: Active Search

Only show caregivers without registered users ☒

Last Name	First Name	Middle Name	Skill Category	Email	Registration
starts with	starts with	starts with	starts with	contains	starts with

- **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**.

MatrixCare

USER SETUP

Office: Michael's Office Status: Active Search

Only show caregivers without registered users ☒

0 of 2 selected

Last Name	First Name	Middle Name	Skill Category	Email	Registration
starts with	starts with	starts with	starts with	contains	starts with
<input type="checkbox"/>	Salokar	Michael	W	michael.salokar@str...	No Invite
<input type="checkbox"/>	Felix	Sopeniza	F	MSALOKAR@GMAIL...	No Invite

- **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.


		Wolff	Penny		HHA		No Invite
---	---	-------	-------	--	-----	--	-----------


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.

Detail For Janet Winters

 Email address required
  Text enabled phone required
  Skill Category required

Email:

Phone:  

Skill Category:  

- **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.

<b>Phone:</b>	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #007bff; color: white; padding: 2px 5px;">(561) 734-9999 (Home)</div> <div style="padding: 2px 5px;">Add New Phone</div> </div>
---------------	---

- 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.

**USER SETUP**

Office:

NextGen of Palm Beach County

Status:

Active

Search

Only show caregivers without registered users ☒

0 of 11 selected

Last Name

First Name

Middle Name

Skill Category

Email

Registration

		Last Name	First Name	Middle Name	Skill Category	Email	Registration
		starts with	starts with	starts with	starts with	contains	starts with
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Thompson	Debbie		HHA	kathwells827@att.net	No Invite
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wells	Katherine		RN	diana.rudnik@matri...	Expired
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Somers	Bianca		HHA	julie.wolff@matrixc...	Expired
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wolff	NoSkill		CMA	iosif.petrou@matrixc...	No Invite
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Wolff	HannaHHA		HHA	nora@gmail.com	Expired
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Saplenza	Nora		RN	felix@gmail.com	No Invite
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Saloman	Felix		HHA	jenniel0382@gmail...	No Invite
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Reynolds	Jennie		HHA	nate.suver@matrixc...	Expired
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Long	Anna		HHA		Expired
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brannew	Nursh		RN		Expired

Submit

The Registration Status will update to "Pending."

		Last Name	First Name	Middle Name	Skill Category	Email	Registration
		starts with	starts with	starts with	starts with	contains	starts with
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salokar	Michael	W		michael.salokar@str...	Pending
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Felix	Saplenza	F	Home Helper	MSALOKAR@GMAI...	Pending

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MatrixCare Home Care Back Office for Mobile Implementation Guide

## 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.

Start Time	Subject	Category	Type	Results	End Time	Share Level
3/16/2016 4:03 PM	Registration Activity Auto Created from Create New User	Registration	Create User	Invite Sent	3/16/2016 4:03 PM	Locked

Details | Related Entities | History

Office: NextGen of Palm Beach | Share Level: Locked | Cost: \$0.00

Start: 3/16/2016 04:03 PM | End: 3/16/2016 04:03 PM | 0.00 Hrs

Category: Registration | Type: Create User | Result: Invite Sent

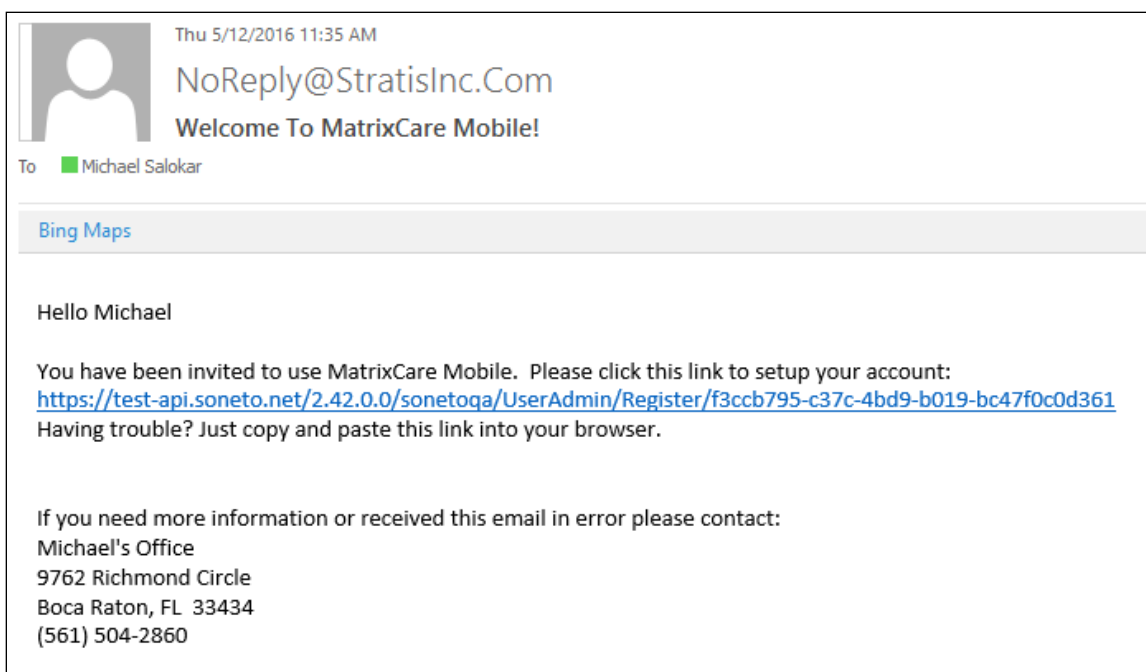
Subject: Registration Activity Auto Created from Create New User

Notes: | Reminder: | Letter: | Display On Calendar: ☐

## Registration Invite Email

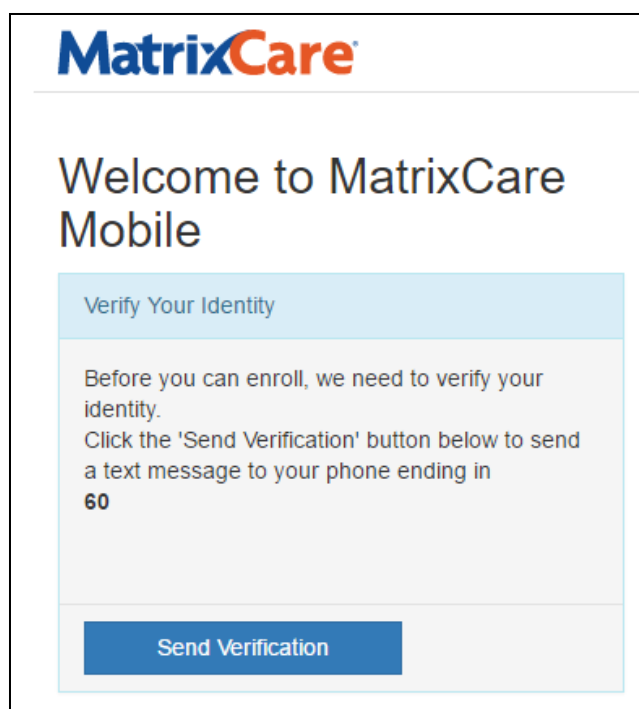
The Registration Invite Email is sent to the address specified for the caregiver on the Create User Setup page. This should be received on their mobile phone, and be the same mobile phone that they use to receive texts.

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

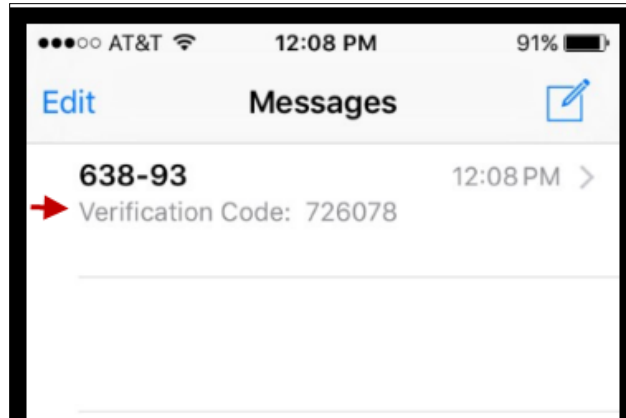


## Verification Text

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**.

### Verify Your Identity

Before you can enroll, we need to verify your identity.  
Click the 'Send Verification' button below to send a text message to your phone ending in **41**.

**Send Verification**

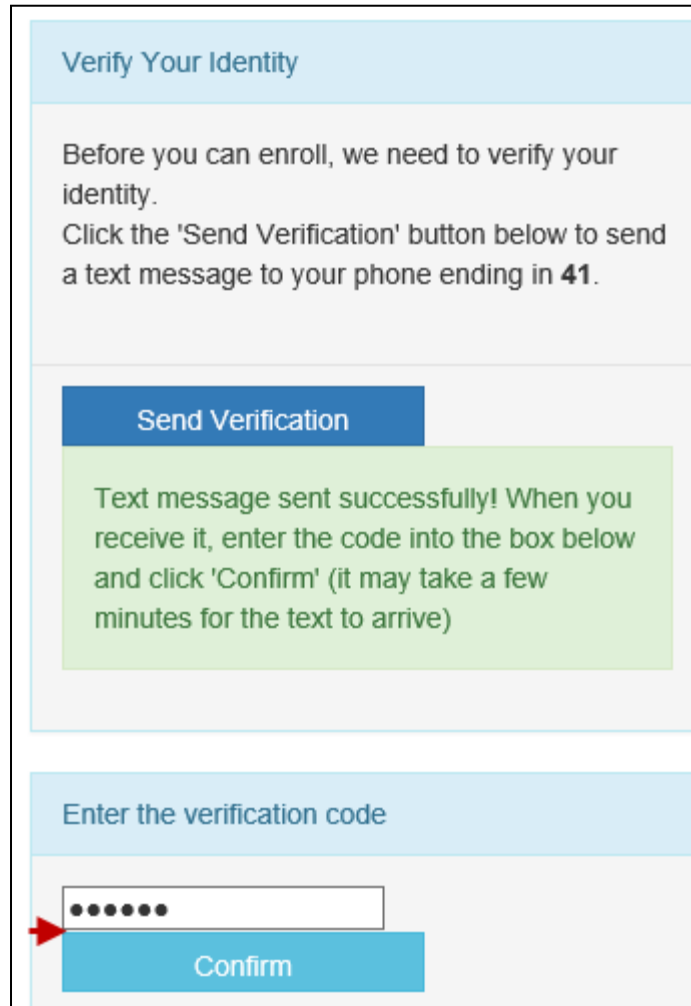
Text message sent successfully! When you receive it, enter the code into the box below and click 'Confirm' (it may take a few minutes for the text to arrive)

### Enter the verification code

**Confirm**

## Create Account Page

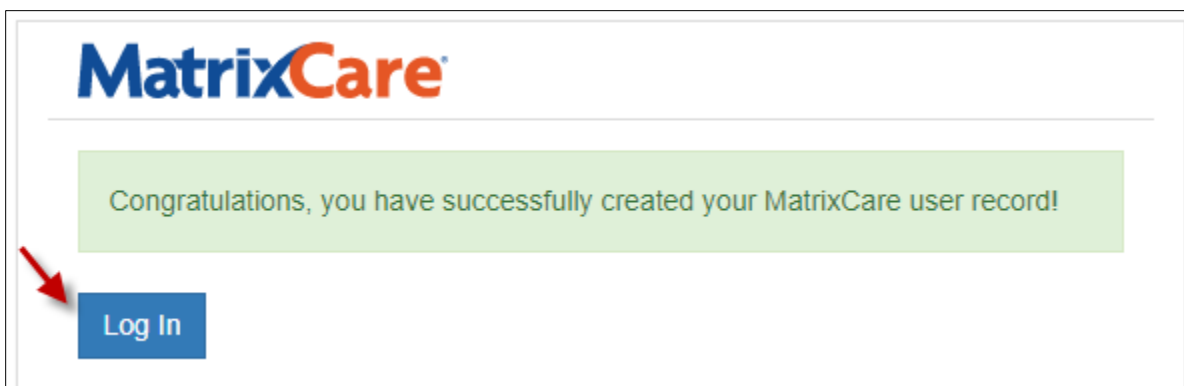
The Create Account page opens. The caregiver enters their Username, Password, and confirms their Password. The password policy displays at the top of the page to assist the user. Press **Create Account**.



The screenshot shows the 'Verify Your Identity' section of the Create Account page. It features a light blue header with the title 'Verify Your Identity'. Below the header, there is a grey box containing the text: 'Before you can enroll, we need to verify your identity. Click the 'Send Verification' button below to send a text message to your phone ending in 41.' Below this text is a blue button labeled 'Send Verification'. Underneath the button is a green box with the text: 'Text message sent successfully! When you receive it, enter the code into the box below and click 'Confirm' (it may take a few minutes for the text to arrive)'. Below the green box is another light blue header with the title 'Enter the verification code'. Underneath this header is a white input field with six dots, and a red arrow points to it from the left. Below the input field is a blue button labeled 'Confirm'.

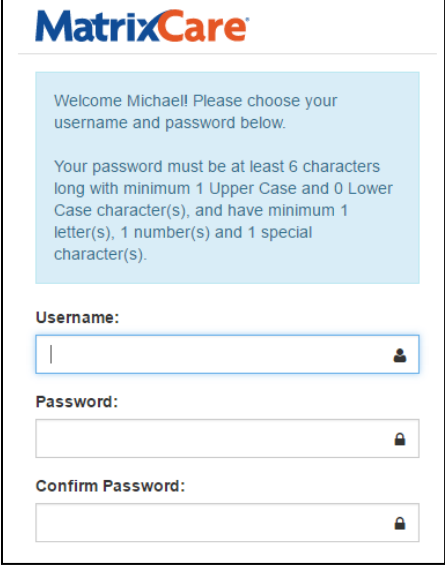
## Log In

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



The screenshot shows the Log In page. At the top is the MatrixCare logo. Below the logo is a green box with the text: 'Congratulations, you have successfully created your MatrixCare user record!'. Below the green box is a blue button labeled 'Log In', and a red arrow points to it from the left.

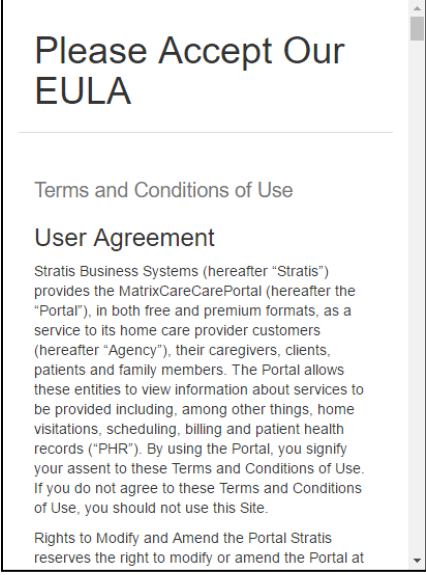
The Mobile Sign In page opens. The mobile user enters their user name and password, and presses **Sign In**.



The image shows the MatrixCare mobile sign-in interface. At the top is the MatrixCare logo. Below it, a light blue box contains a welcome message for 'Michael' and instructions to choose a username and password. A password requirement box specifies: '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)'. Below this are three input fields: 'Username:' with a person icon, 'Password:' with a lock icon, and 'Confirm Password:' with a lock icon.

## Accept EULA

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



The image shows a screen titled 'Please Accept Our EULA'. Below the title is a horizontal line. Underneath, the text reads 'Terms and Conditions of Use' followed by 'User Agreement'. The main body of text states: 'Stratis Business Systems (hereafter "Stratis") provides the MatrixCareCarePortal (hereafter the "Portal"), in both free and premium formats, as a service to its home care provider customers (hereafter "Agency"), their caregivers, clients, patients and family members. The Portal allows these entities to view information about services to be provided including, among other things, home visitations, scheduling, billing and patient health records ("PHR"). By using the Portal, you signify your assent to these Terms and Conditions of Use. If you do not agree to these Terms and Conditions of Use, you should not use this Site.' At the bottom, it says 'Rights to Modify and Amend the Portal Stratis reserves the right to modify or amend the Portal at'. A vertical scrollbar is visible on the right side of the text area.

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

### Questions, Complaints and Contacts

If you have any questions about this Policy, or any other aspects of your privacy, please contact your Agency which provided you with access to the Site or Portal.


☒ **Yes, I Accept the MatrixCare Site Terms and Conditions**

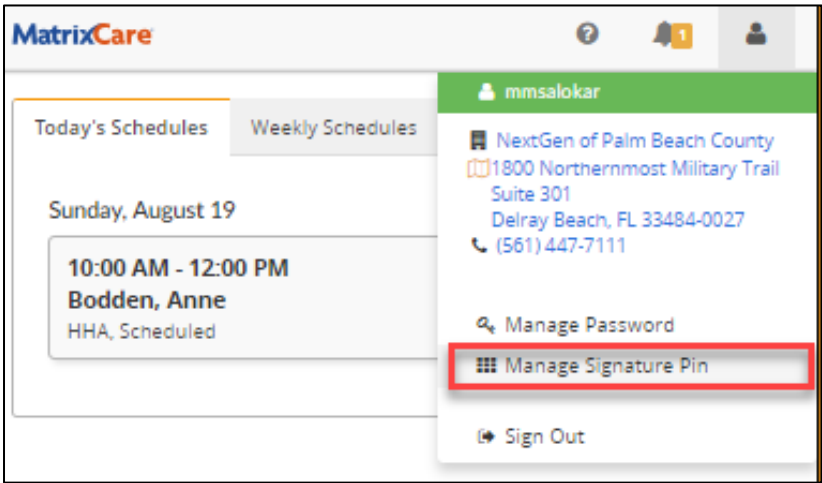
[Continue](#)

## 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**.



### Change Signature PIN

PIN must be 4 numeric digits.

**Current Password**

**New Signature PIN**

**Confirm New Signature PIN**

**Change PIN**

## Registration Activity - Registration Complete

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

Start Page x
Caregiver List x
Wolff, N x

HR Payroll **Activities** Pay Rates Contacts Skill Codes Expirations Training Matching Offices Attachments Reports

Select Last: Wolff First: Nicole Middle: Status: Active ID: 13268 Office: NextGen of Palm Beach Count

Activities Communications From Date: 11/17/2015 To Date: 4/15/2016 Search

	Subject	Category	Type	Results	End Time	Share Level	Remin
3/16 4:03 PM	RegistrationActivity Auto Created from...	Registration	Create User	Registration Complete	3/16/2016 4:03 PM	Locked	

Details Related Entities History

Office: NextGen of Palm Beach Share Level: Locked Cost: \$0.00

Start: 3/16/2016 04:03 PM End: 3/16/2016 04:03 PM 0.00 Hrs

Category: Registration Type: Create User Result: Registration Complete

Subject: Registration Activity Auto Created from Create New User

Notes: Reminder:

Letter: Display On Calendar:

## 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 screenshot shows the MatrixCare User Configuration interface for user 'msalokar'. The interface includes a top navigation bar with tabs for Main, Reminders, Scheduling, Payroll, Activities, Security, and Reports. Below the navigation bar, there are fields for user identification: Last Name (Salokar), First Name (Michael), User Name (msalokar), Office (NextGen of Palm Beach), ID (10621), and an Active checkbox. The main configuration area is divided into two columns. The left column, titled 'User Configuration', contains settings for the Working Office (NextGen of Palm Beach County), Default Attachment Location (C:\Users\msalokar\Documents), Record picture display option (Always), Use Local Help (checked), Show My Dashboard on Startup (checked), Show Notifications on Startup (checked), Pin Reminders on Startup (unchecked), Pin Drive List on Startup (unchecked), Default Client Inquiry View (List), Default Client View (List), Default Caregiver View (List), Default Referral Source View (List), Activity Default Days Prior (30), Activity Default Days Following (30), and Use Time Zone From (Office). The right column, titled 'Address Information', contains fields for Address 1 (9762 Richmond Circle), Address 2, City (Boca Raton), State (FL), Postal Code (33434), County (Palm Beach), and Country (United States). Below the address information is a table of phone numbers with columns for Priority, Type, Phone No, and Note. The table contains one entry: a Mobile phone number (561) 504-2860 X with the note 'My Phone'. Below the table is an email field (michael.salokar@matrixcare.com) and a checkbox for 'Allow MatrixCare to Email this User'. At the bottom of the interface, there are fields for Created On (4/3/2016 6:01:19 AM), Modified On (8/1/2018 1:42:27 PM), Created By (jwolff), and Modified By (msalokar).

Pri	Type	Phone No	Note
1	Mobile	(561) 504-2860 X	My Phone

The User record is mapped to the Caregiver record.

Start Page x nmwolff x

Main Reminders Scheduling Payroll Activities **Security** Reports

Select Last: Wolff First: Nicole User Name: nmwolff  
Office: NextGen of Palm Beach ID: 10601 ☒ Active

[Change Password](#) User Must Change Password: ☐  
[Reset User Account](#) Exceeded Login Attempts: ☐  
 Password Never Expires ☐

This user is not setup for digital signatures

Idle Time Lock Minutes:  
 Timer: 5 (Number of minutes before your session is locked)

This User Maps To:  
 Entity Type: Caregiver Wolff, Nicole  
 Edition: Send Welcome Email  
 Soneto Access: No  
 Soneto Portal Access: No

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.

Start Page x Group Users Smith, I x

Main Reports

Select Last: Smith First: Irene User Name: ismith

Unassigned Groups: Add ➡

Payroll Assistant
Period CloseJob
Plan of Care Service Plan History
POC User (Skilled)
Portal.Caregivers.Standard
Portal.Clients.Standard

Remove ⬅ Assigned Groups:

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

Offices:

<input checked="" type="checkbox"/>	NextGen of Palm Beach County
<input type="checkbox"/>	212-4
<input type="checkbox"/>	332
<input type="checkbox"/>	517
<input type="checkbox"/>	Account Out City
<input type="checkbox"/>	AHSS

# 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

**Bodden, Anne**  
Status: Active

Demographics

Schedules

Service Plan



Client Chart

**Bodden, Anne**  
11555 Heron Bay Blvd  
Apt 301  
Coral Springs, FL 33321  
(305) 661-5569 (Home)  
msalokar@gmail.com

**Birth Date:** 9/19/1960   **Age:** 57  
**Gender:** Female

**Race:** White  
**Marital Status:** Married

**SOC:** 3/1/2017  
**Discharge:**

**Plan Of Care Duration:**  
7/15/2018 - 9/12/2018 (Current Plan Of Care)

**Type:** Direct Care  
**Disaster Plan Code:** Call Larry Bodden

**Disaster Planning:** Here brother will pick her up. 561-504-3323

**Notes:**

**PHYSICIANS:**

Fox, Manning

Salts, William

Teolone, Liz

**CONTACTS:**

Bodden, Charles James

Richards, Dan

Jean, Lisa

**PAYERS:**

## 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

The screenshot shows the 'Client > Schedules' interface for Anne Bodden. At the top, the client's name 'Bodden, Anne' and status 'Active' are displayed. Below this are three tabs: 'Demographics', 'Schedules' (which is selected), and 'Service Plan'. A date range '8/19/2018 - 8/25/2018' is shown with navigation arrows. An 'Add New Schedule' button is in the top right. A note states: 'This icon refers to documentation related to a non-scheduled event'. The schedule is organized by day. For Sunday, August 19, there are three entries: 10:00 AM - 12:00 PM with Salokar, Michael (HHA, Scheduled); 12:38 PM - 12:53 PM with Salokar, Michael (Client Documentation, Doc Started); and 1:31 PM - 1:46 PM with Salokar, Michael (Client Documentation, Doc Started). For Monday, August 20, there is one entry: 8:00 AM - 12:00 PM with RN Salokar, Joe (RN, Scheduled).

## 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.

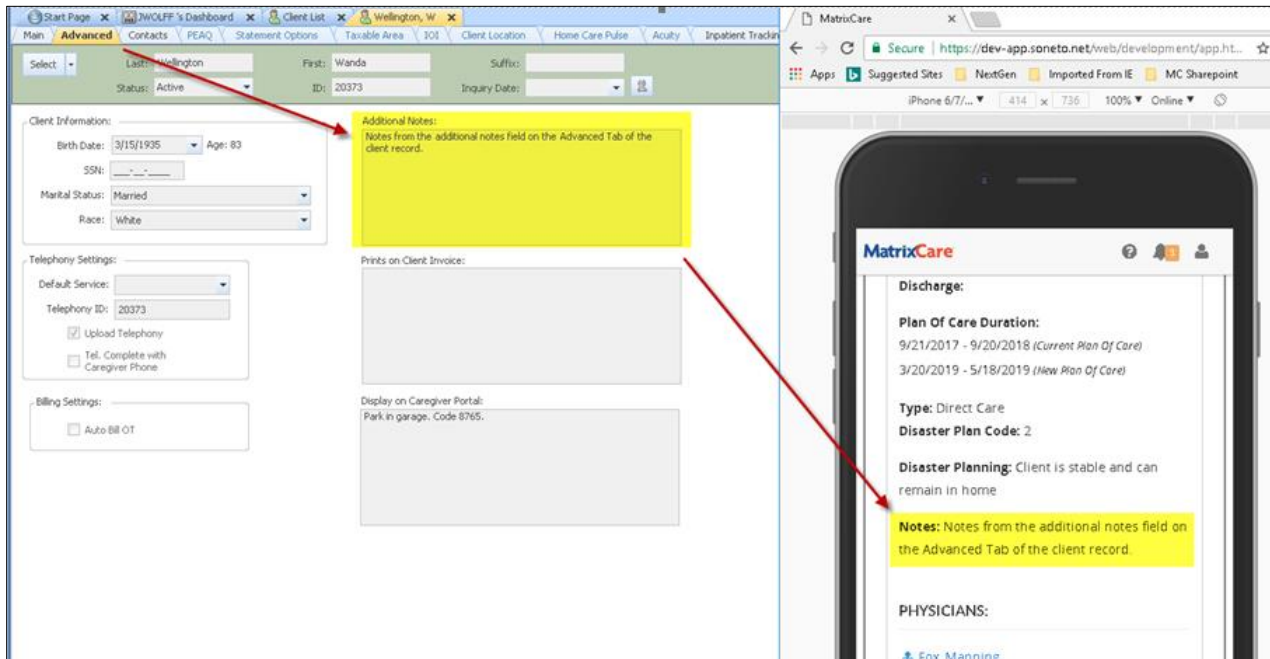
The screenshot shows the 'Client > Service Plan' interface for Anne Bodden. At the top, the client's name 'Bodden, Anne' and status 'Active' are displayed. Below this are three tabs: 'Demographics', 'Schedules', and 'Service Plan' (which is selected). The service plan is organized into three sections: 'Personal Care' with tasks 'Bathing - Tub/Shower (Use body lotion)', 'Wash Hair (Use warm water, shampoo and conditioner)', and 'Comb/Brush Hair (Use a soft brush)'; 'Nutritional Services' with tasks 'Prepare/Serve Breakfast', 'Prepare/Serve Lunch', and 'Encourage Fluids'; and 'Vital Signs' with the task 'Temperature (F)'.

## 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.

The screenshot displays the MatrixCare software interface. On the left, the 'Advanced' tab is selected, showing client information for Janet Westmore (ID: 20372). The 'Display on Caregiver Portal' field is highlighted with a red box and contains the text 'Gated Community, Gate 2, Code: 66754'. A red arrow points from this field to the 'Note from Client Record' section on the right. The right panel shows the 'Schedule Details' for Janet Westmore, including appointment times, service status, and office information. The 'Note from Client Record' section at the bottom of the right panel also contains the text 'Gated Community, Gate 2, Code: 66754'.

**Client Information:**

- Last: Westmore, First: Janet, Suffix:
- Status: Active, ID: 20372, Inquiry Date:
- Birth Date: 5/13/1935, Age: 83
- SSN: 045-66-7876
- Marital Status: Widowed
- Race: White

**Additional Notes:**

Client's daughter visits every other weekend (1st and 15th of the month).

**Telephony Settings:**

- Default Service:
- Telephony ID: 20372
- ☒ Upload Telephony
- ☐ Tel. Complete with Caregiver Phone

**Billing Settings:**

- ☐ Auto Bill OT

**Display on Caregiver Portal:**

Gated Community, Gate 2, Code: 66754

**Schedule Details:**

Westmore, Janet

11555 Heron Bay Blvd  
Coral Springs, FL 33321  
(452) 454-5555

**Start Time:** 10/15/18 8:00 AM  
**End Time:** 10/15/18 12:00 PM (4:00 hrs)

**Check In:**  
**Check Out:**

**Service Status:** Scheduled  
**Service Code:** HHA

**Office:** NextGen of Palm Beach County  
**Office Phone:** (561) 447-7111

**Note from Client Record:**

Gated Community, Gate 2, Code: 66754

# 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.

The screenshot displays the MatrixCare Home Care Back Office interface. At the top, there is a navigation bar with tabs: Start Page, Client List, and a dropdown for 'Bodden, A'. Below this is a sub-navigation bar with various modules: Main, Advanced, Contacts, PEAQ, Statement Options, Taxable Area, IOI, Client Location, Home Care Pulse, Acuity, Inpatient Tracking, Activities (selected), Payers, Admissions, and Bill Ra. A search bar is present with fields for Last (Bodden), First (Anne), Suffix, Status (Active), ID (20755), and Inquiry Date (5/17/2016). Below the search bar, there are tabs for Activities (selected) and Communications. A date range filter shows From Date: 7/3/2018 and To Date: 9/1/2018. The main table lists activities with columns: Start Time, Notes, Subject, Category, Type, Results, End Time, and Share Level. Two activities are shown: one on 7/6/2018 at 10:21 AM and another on 7/5/2018 at 2:35 PM. Both are 'Client Documentation Activity Auto Cr...' with 'Doc Started' results and 'Locked' share levels. Below the table, there is a details panel for the selected activity. It includes fields for Office (NextGen of Palm Beach), Share Level (Locked), Cost (\$0.00), Start (7/6/2018 10:21 AM), End (7/6/2018 10:36 AM), Duration (0.25 Hrs), Category (Client Docum), Type (Client Documentation), Result (Doc Started), Subject (Client Documentation Activity Auto Created), Notes, Reminder, Letter, and a checkbox for Display On Calendar (checked).

Start Time	Notes	Subject	Category	Type	Results	End Time	Share Level
7/6/2018 10:21 AM		Client Documentation Activity Auto Cr...	Client Docume...	Client Docume...	Doc Started	7/6/2018 10:36 AM	Locked
7/5/2018 2:35 PM		Client Documentation Activity Auto Cr...	Client Docume...	Client Docume...	Doc Started	7/5/2018 2:50 PM	Locked

**Details** | Related Entities | History

Office: NextGen of Palm Beach | Share Level: Locked | Cost: \$0.00

Start: 7/6/2018 10:21 AM | End: 7/6/2018 10:36 AM | 0.25 Hrs

Category: Client Docum | Type: Client Documentation | Result: Doc Started

Subject: Client Documentation Activity Auto Created

Notes: | Reminder: | Letter: | Display On Calendar: ☒



## 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.

The screenshot shows the MatrixCare Inpatient Tracking interface for client Anne Bodden (ID: 20755). The top navigation bar includes tabs like Main, Advanced, Contacts, PEAQ, Statement Options, Taxable Area, IOI, Client Location, Home Care Pulse, Acuity, Inpatient Tracking (selected), Activities, Payers, Admissions, Bill Rates, and Caregiver Specific B. The client information bar shows Last: Bodden, First: Anne, Status: Active, ID: 20755, and Inquiry Date: 5/17/2016. The main content area displays the client's name, a back button, and a Client Chart link. A summary box for Delray Medical Center shows the Facility Type as Hospital, Admission Date as 8/5/18, Infection, and Discharge Date as 8/7/18, Discharged to Home with Skilled Care. An Add Inpatient Record button is visible on the right.

The screenshot shows the MatrixCare Inpatient Tracking interface for client Anne Bodden (ID: 20755) with the form to add a new inpatient record. The top navigation bar and client information bar are the same as in the previous screenshot. The main content area displays the client's name, a back button, and a Client Chart link. The form fields are as follows:

- \*Facility: Delray Medical Center
- Facility Type: Hospital
- \*Admission Date: 08/05/2018
- \*Admission Reason: Infection
- Discharge Date: 08/07/2018
- Discharge Disposition: Discharged to Home with Skilled Care

A Save button is located at the bottom right of the form.

---

## 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.

<b>Warning Messages</b>	<b>Description</b>
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.