# MatrixCare®
*by* **ResMed**

**MatrixCare for Home Care**

**Mobile Caregiver (HHA)**

**Electronic Visit Verification Offline App**

**User's Guide**

**Version: 2020 R3**

***MatrixCare® for Home Care Mobile Caregiver (HHA) Electronic Visit Verification App Users Guide***

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

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# About Mobile Offline Syncing

MatrixCare for Home Care Mobile Offline Electronic Visit Verification (EVV) Syncing is a feature that allows mobile Caregiver users such as; Home Health Aides, Personal Care Attendants, and Homemakers access to data in an environment when disconnected from the internet. This feature provides the ability to work on a disconnected device to view client and caregiver scheduling information in a secure environment, completely detached from the internet. This is especially useful to prepare for situations, when power or internet access may be compromised.

**Important!** In order for caregivers to successfully use the new Mobile EVV Android and iOS apps, the office must be on Home Care R9 (v1.60).

Please contact Support and schedule your upgrade before instructing caregivers to download the APP from Google Play or the App Store.

**Important!** Existing caregivers that currently use the Home Care web application who want to transition to the Home Care Mobile Caregiver Android App and iOS apps should **not** use both the web and Android or iOS apps interchangeably as this will cause data issues. Once you start using the Android or the iOS App, you must remove the bookmark to the Home Care Web application.

**Note**: If you are using an iPhone, it must be an iPhone 6 or later to use the EVV Offline App.

# Caregivers Working Offline on a Mobile Device

Home Health Aids (HHAs), Personal Care Attendants, and Homemakers can now access client visit data when they do not have internet access. When a Caregiver is at a client's home and no internet service is available, the Caregiver now has the ability to document the client visit in offline mode. Caregiver's can also manually sync their data by tapping the sync button on their mobile device.

The App will auto sync when you enter your passcode, and when you check in and check out of schedules when the internet is available. Offline entries are stored on the device and included in the next sync. There is a sync button on the tool bar to perform a manual sync as needed. After a schedule is checked in, all changes to tasks (for example: checking as complete, entering notes, not completed reasons, and measurements) are stored locally on the device, and are included in the sync when the schedule is checked out.

The sync will first upload any check ins or check outs to the back office. Then it will download updates to any schedules or to notifications onto your device. Schedules that have been checked in will not be updated from the back office until after they are checked out. It is recommended to sync at the beginning of your workday, and as soon as you can after being offline.

**Note**: You can only have one user per device.

The following data can now be documented and saved when a Caregiver is in offline mode:

- Services performed

- Client receiving the service

- Caregiver providing the service

- Date the service was performed

- Location of where the service was performed

- The date and time the service begins and ends

The following functionality is available when a Caregiver is in offline mode:

- Able to view their schedule

- Can check in and have the ability to capture the date and time, and GPS location

- Document each task performed, including notes, and reason not completed.

- Check out functionality including certifying time, caregiver and client signatures.

# General Instructions for Mobile Caregivers

## Installation and Initial Login for the Caregiver

**Important!** You must be connected to the internet for the initial login.

The MatrixCare for Home Care app is located in the Google App Store and the Apple App Store. To find the app, do the following:

1. On your mobile device, go to the Google Play store or the Apple App Store and search for "**MatrixCare for Home Care"** and download it.



2. It is recommended to set to **Enable auto-update** for the app. This keeps the application upgraded automatically with new releases and prevent you from having to manually apply updates from the Google Play Store or from the Apple App Store.
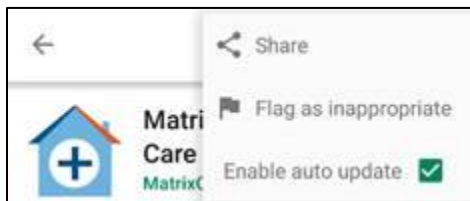
iPhone users: Tap Settings > [your name] > iTunes & App Store. To get Automatic Updates for apps, turn on Updates. Any new versions of apps that you currently have on your device will automatically download when they're available.

**Note**: If auto-update is not enabled when an update is required, you will see a message when you attempt to sync that your application is out of date and an update is required. You must go to Google Play Store or App Store and update the app. You can continue to work in the app but will not be able to sync until you update.
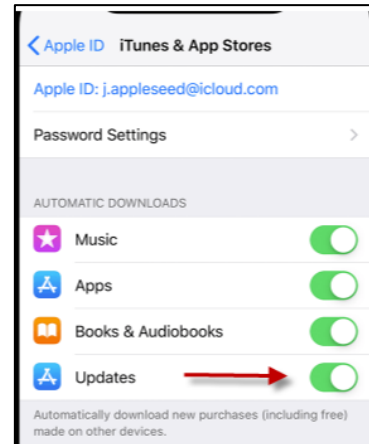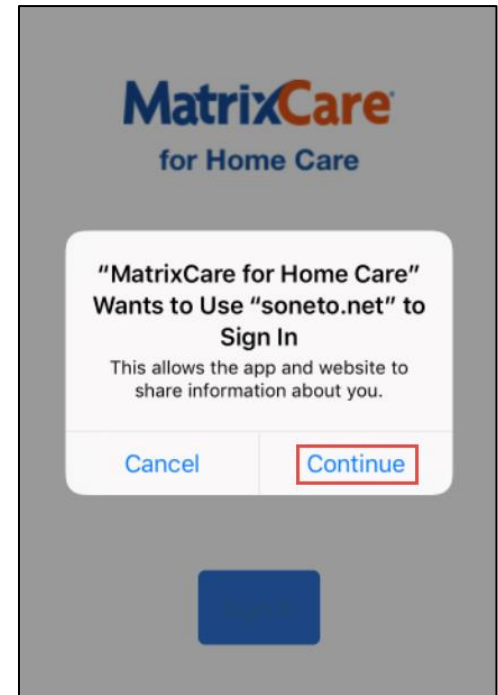
3. When the app download is complete, tap **Open**.

4. Tap SIGN IN.
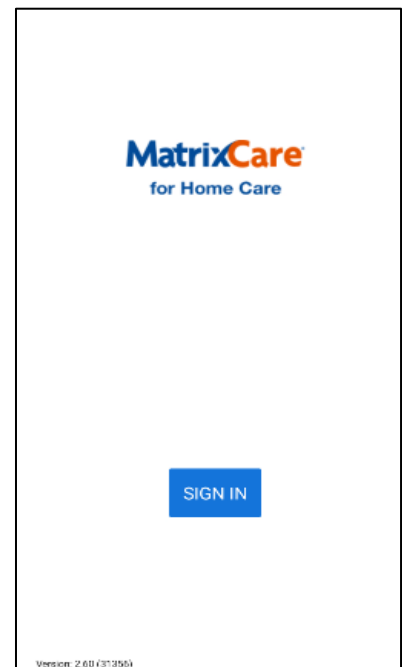
5.  For iPhone iOS users, the following message appears: "MatrixCare for Home Care" Wants to Use "soneto.net" to Sign In. Tap **Continue** to sign into the app. This will allow the app to display the Sign In page where you will enter your username and password.

# Signing into the Mobile Caregiver App

To sign in to the MatrixCare Home Care Mobile app:

1. On the Sign in page, enter your **Username**, **Password**, and **Tenant** code.

   **Important!** The Tenant code shown is for illustration only. Your agency will have a specific Tenant code for you to enter.

   **Note**: The password is case-sensitive.

2. Tap Sign In.

   A page opens prompting you to create a new passcode.

3. Create a 4-digit passcode. This passcode is used to open the app and will also be used as your digital signature pin. Enter your 4-digit passcode.

4. Verify by re-entering your 4-digit passcode again.

MatrixCare
for Home Care

Getting your schedule list.. Please Wait..
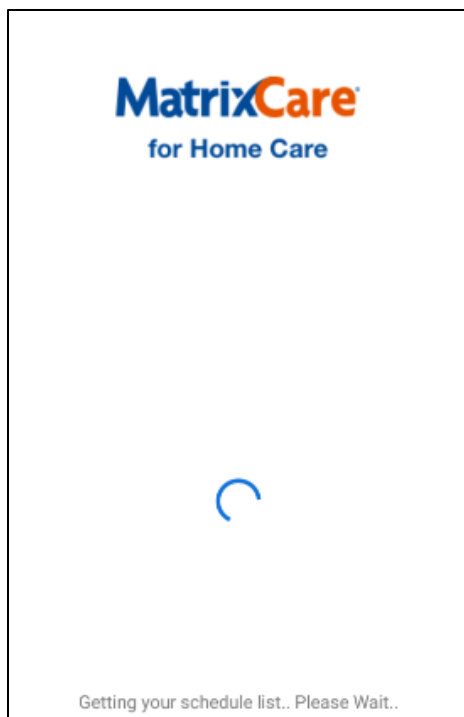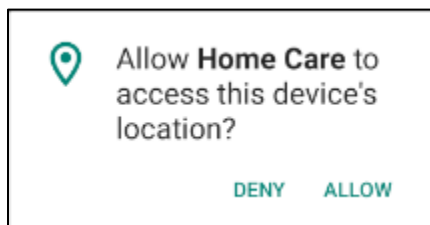
5. A message appears allowing the Home Care app to access the device's location. Tap **ALLOW** so the GPS locater can sync with the Home Care app. Some devices may automatically allow access to the GPS locater.



Allow **Home Care** to access this device's location?

DENY    ALLOW

# Opening the Mobile Caregiver Offline App after the First Time

To open the mobile Caregiver offline app after the first time, tap the Home Care app icon on your devices home page. The Home Care splash page appears, and the Enter Passcode page appears to enter your 4-digit passcode. The app will load and automatically run the sync when you are online. You may work in the Home Care app while the sync is running.
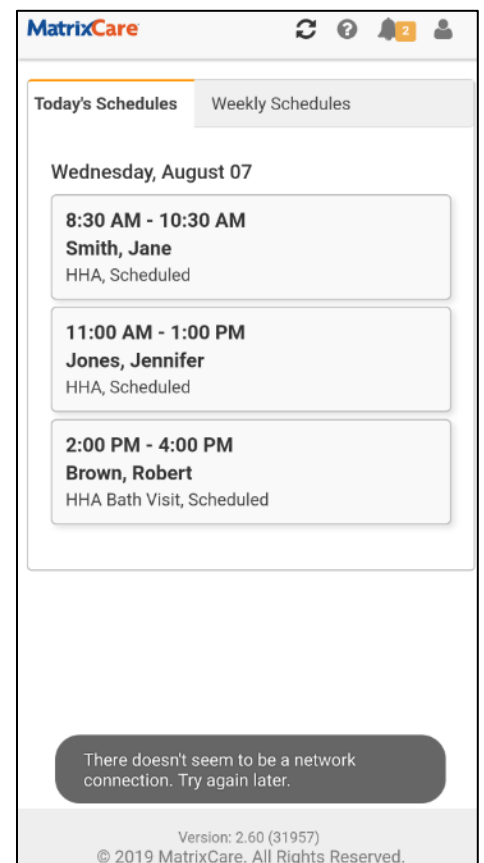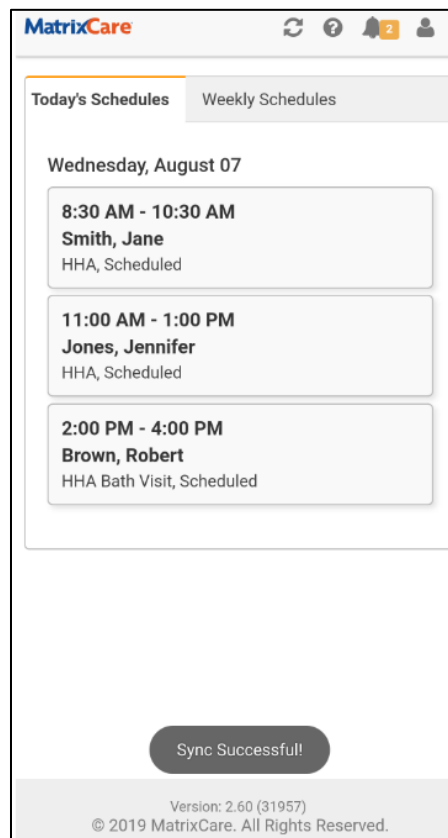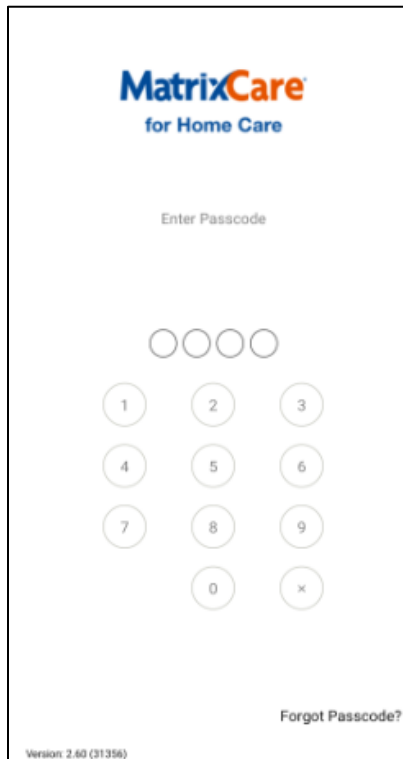






**Note**: When a sync starts, and you are not connected to the internet, a message displays: "There doesn't seem to be a network connection. Try again later." You can manually tap the **Sync** button in the header bar to start a sync when your internet connection is back online.

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# Forgot Passcode?

If you forget your passcode, tap the "**Forgot Passcode?**" link at the bottom right of the Enter Passcode page. You must be online to use this link to change your passcode. A message appears, informing you that "Resetting your passcode will take a few minutes while it rebuilds your local database. Pending check ins and check outs will be synced. Task entries that are not checked out will be lost."

Tap **Yes** to proceed and change your passcode, or tap **No** to cancel. After tapping **Yes**, iPhone iOS users will receive the following message: "MatrixCare for Home Care" Wants to Use "soneto.net" to Sign In. Tap **Continue** to sign into the app. This will allow the app to display the Sign In page where you will enter your username and password.
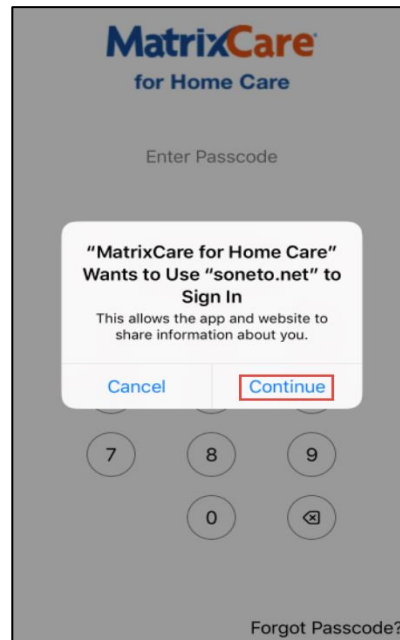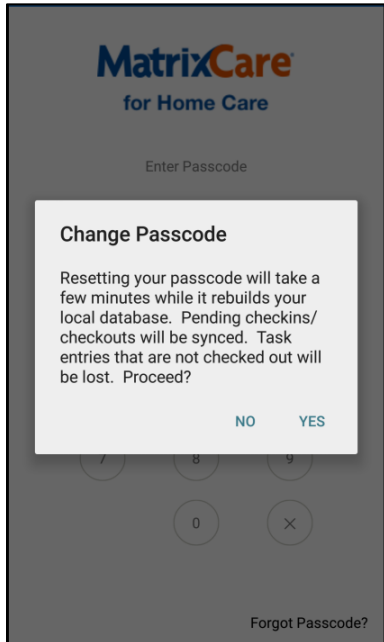


**Note**: When entering your passcode, you have 10 attempts to enter the correct passcode. After the tenth attempt, all un-synced data will be lost and you are prompted to login with your username and password so you can create a new passcode.



**Important!** We recommend to use the "**Forgot Passcode?**" link to reset your passcode. Using that option syncs your pending check ins and check outs.
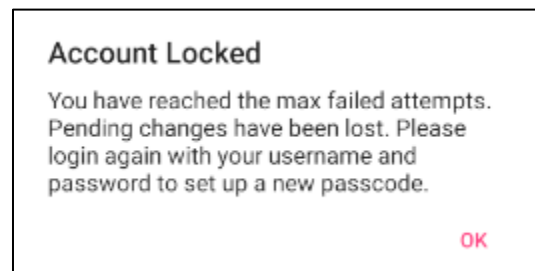
# High Level Main Menu Overview

The following information provides the Caregiver a brief high level overview of the MatrixCare Home Care Mobile app. The main features in this app include:

- **MatrixCare** - Tapping the MatrixCare home logo returns you to the Todays Schedules page.

- ⟳ **Sync** - Tapping the sync button starts a sync and updates the information to the back office database when your internet connection is back online.

- ⓘ **Help** - Tapping the question mark provides a quick tour of main functions on each page of the app.

- 🔔² **Notifications** - Tapping the bell shows a list box 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** - Tapping the person image shows a list box that allows you to view your Home Care Agency office information.
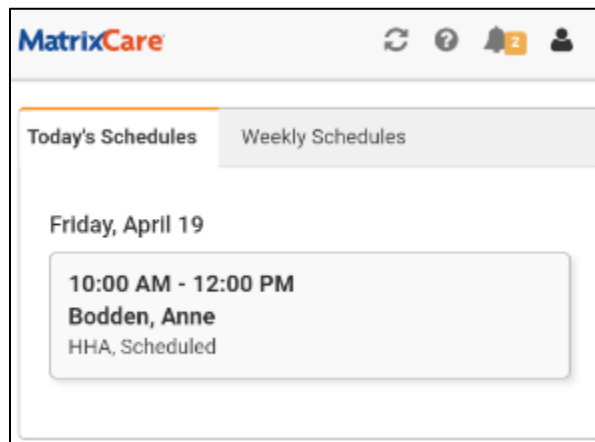
- **Schedules** - When logging in or tapping the MatrixCare logo, a list of clients you are scheduled to visit today appear. Tap on a schedule to view more detail, and to check in and check out. Weekly Schedules display a list of clients that you are scheduled to visit this week, past weeks, or future weeks that are prescheduled. Once you are checked in, a reminder message appears above the scheduled time to "Please check out after visit". The reminder will display on schedules where the end day is 'today' and have been checked in but not yet checked out.
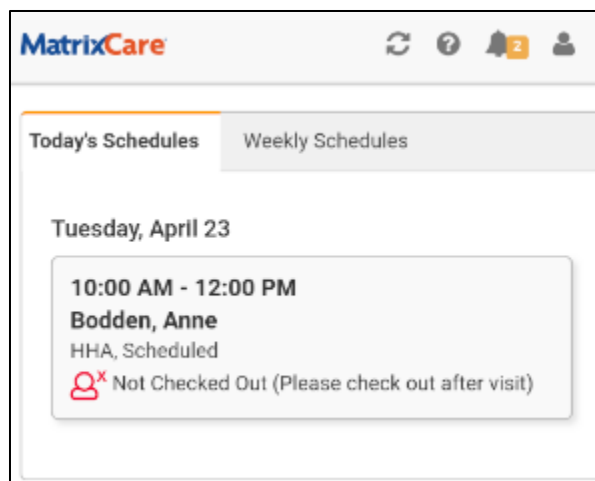
  **Note**: When offline, schedules outside the range of yesterday, today and tomorrow will display the message "Schedule details are not available: you must have an internet connection to view this record".  To be able to open these schedules offline, the caregiver will need to open the schedule when online earlier the same day as they will be getting the client signature

  For example, if a caregiver needs to get a new signature on a schedule from seven days ago, where there is no internet is available, they would need to open the schedule while being on line prior to arrival at the client visit.

# Viewing Today's and or Weekly Schedules

Upon sign in, the main default page shows a list of Today's Schedules.

To view your schedules details sent to you by your Home Care Agency office follow these steps:

1. Tap the schedule of the client you are scheduled to visit today.

**Note**: When viewing schedule details, always 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 **Set tings**, **General**, **Date & Time** then **Time Zone**.
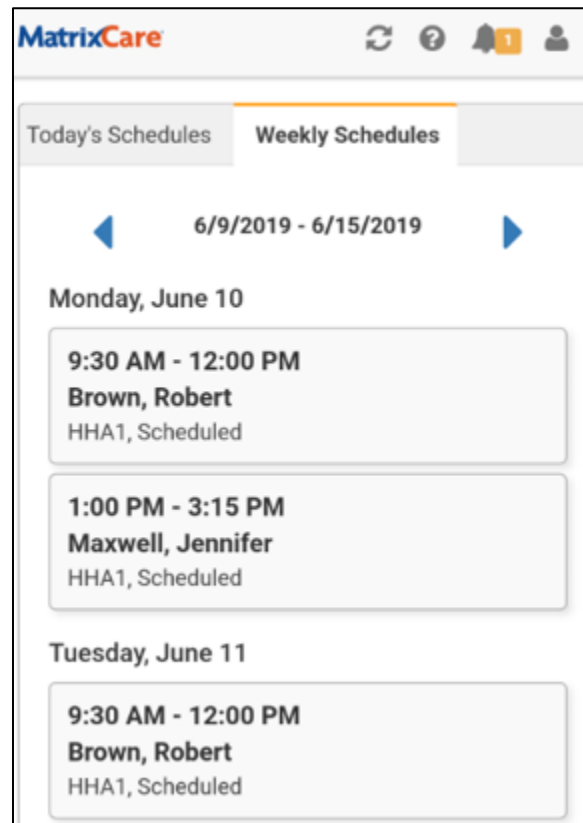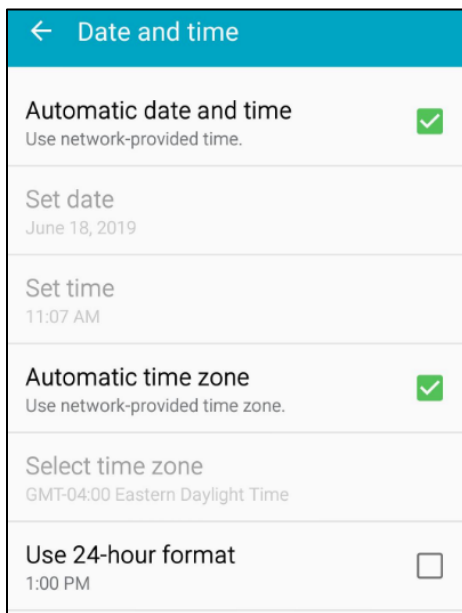
**Important!** For Weekly Schedules, schedules will show one week prior to today's date and two weeks after today's date in the schedule list, unless your agency office is configured to display a shorter duration.

Additionally, any schedules that are checked in and not checked out will continue to display on the schedule list with schedule details available until they are checked out.

## Overnight Schedules

A Caregiver with an overnight schedule that ends on the current date, can see that schedule on Today's Schedules or Weekly Schedules so it's easy to find when checking out from a client visit.

For example, if a schedule extends over Friday night through Saturday morning, the schedule will now appear on both days, and it will include the start day and the end day in the list view. This applies to all extended schedules from the previous day.

This example shows Today's Schedules with a start time of 9:00 PM on Friday, April 19 and an end time of 1:00 AM on Saturday, April 20:
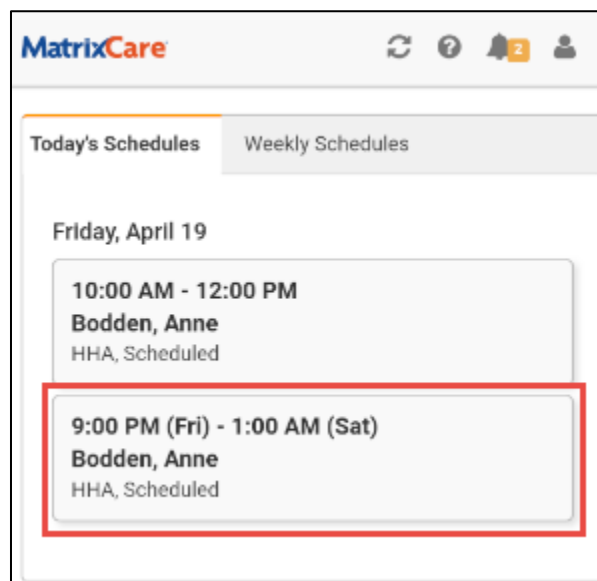


This example shows Weekly Schedules with a start time of 9:00 PM on Friday, April 19 and an end time of 1:00 AM on Saturday, April 20. The schedule shows on Friday (the day it starts) and also shows on Saturday (the day it ends).
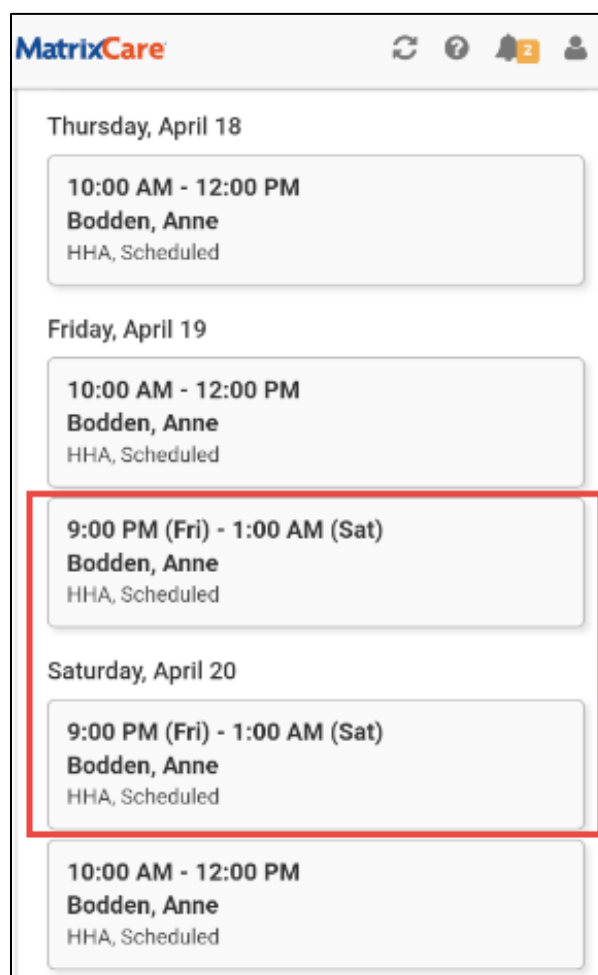
# Checking in at the Client Location

After arriving at the client's location, you are ready to begin the check in process. The MatrixCare Home Care mobile app will verify your location.

To begin your client visit:

1. Tap **Check In**. This will record your GPS location and the date and time you arrived. After checking in to a client's visit, a sync will automatically run. You can continue to work in the app while the sync is running.

   - When the sync is complete, a message "Sync Successful!" will appear.
   - If your device does not have internet access, a message "There doesn't seem to be a network connection. Try again later." appears.

   **Note**: The MatrixCare Home Care mobile app knows your location. If the app does not know your location a message appears requesting, you to allow the app to know your current location. Tap **Allow** to complete the location process on your device. You may attempt to check in again to get a better location reading using **Retry Check In**. When your location is correct, the record will update successfully.
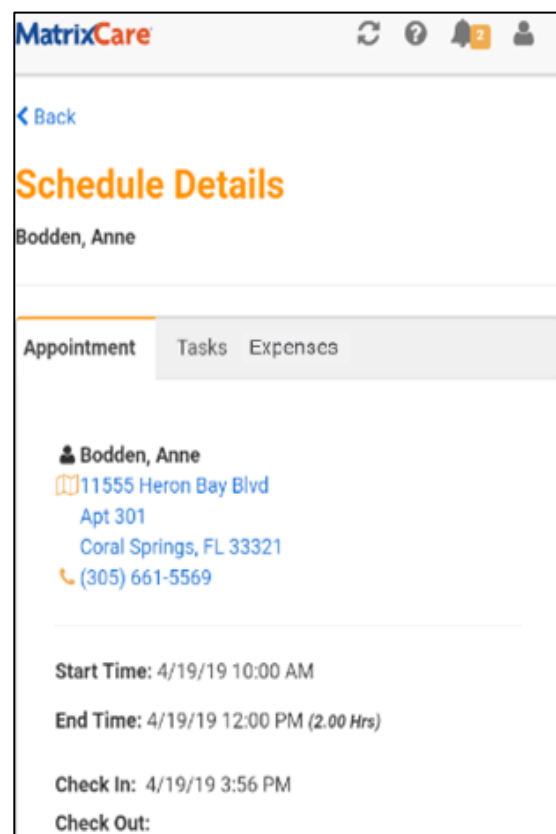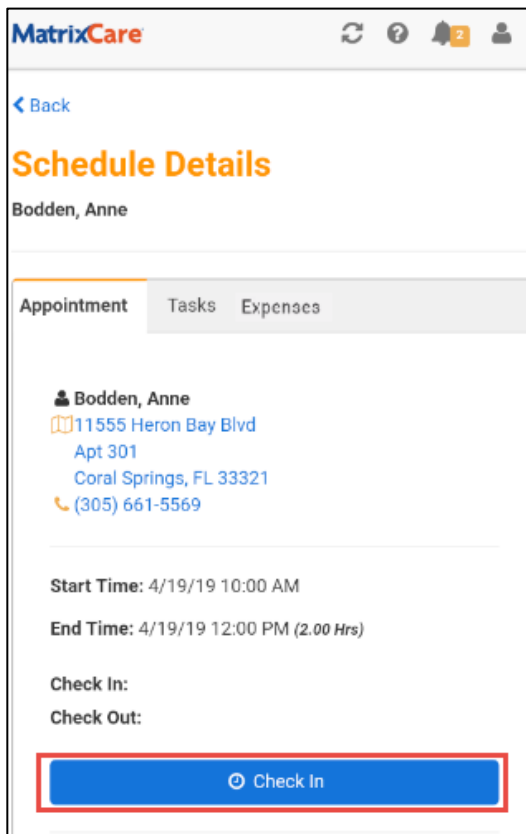


You can now start the client tasks.

**Note**: For clients that have additional notes, they will be displayed on the Appointment tab.

## Performing Client Tasks

To view a list of tasks that you have been assigned to perform on this visit, do the following:

1. Tap the **Tasks** tab. Review the list of tasks and perform them.

   **Note**: The task tab will automatically display after a perfect check in.

2. When tasks are successfully completed, tap each task to check them off as they are completed.

3. Tap **Edit** to enter any notes as required by your Home Care Agency office.

4. If a non-frequency task was not completed, leave the task unchecked. For example, you can tap **Edit** in the notes section to indicate "**Client Refused**" and tap **OK**. Keep in mind that this would be dependent on the agency policy's.

5. Task with frequencies that are not completed and the frequency has not been met for the treatment week will display with a red asterisk indicating you must provide documentation. Tap **Edit** and in the Not Completed Reason field, select a reason. The Not Completed Notes field will display and the Notes field above will clear and become disabled. When **Other** is the reason, the not completed notes field is required. Enter a note why the task was not completed. To add more detail, tap in the field and tap the **Expand** button. A new window appears allowing you to enter more text. You can enter up to 1,000 characters. Tap **OK** to complete and close the notes window. The asterisk will disappear when the task has a not completed reason or is checked as completed.

   **Note**: When you have one or more tasks with an asterisk, a label is shown above the task list as: *Must provide documentation. When the documentation is complete the label disappears.

**Note**: If a task has a Frequency, it is displayed under the Task description and the number of times the task has been completed in the treatment week displays in parenthesis.

6. Scroll down to the bottom of the page and tap **Save**.

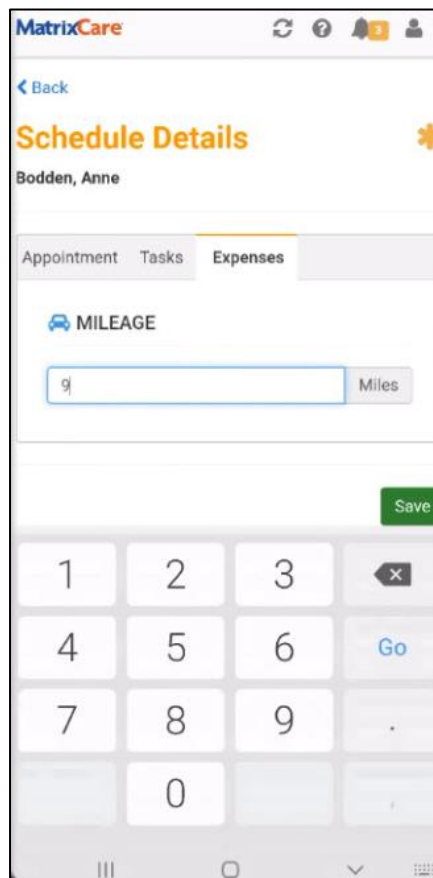## Entering Mileage On the Expenses Tab

To enter mileage, you incurred when traveling to the client visit, do the following:

1. Check into the visit and on the Schedule Details page, tap the **Expenses** tab. Add mileage incurred when traveling to the client.

   **Note**: The mileage is reviewed and approved by your Home Care Agency office. An orange asterisk is shown in the upper right corner when changes are pending. When the mileage is saved, the asterisk disappears.

   Mileage can be deleted by blanking out the field. A confirmation` message appears for you to continue or cancel.

2. Tap **Save** to complete your mileage.

# Checking Out of the Client Location

After all tasks and reporting notes are complete and sufficient scheduled time has gone by, you are now ready to have the client sign the Daily Visit sheet to complete the checkout process.

To begin the checkout process:

1. Tap the **Appointment** Tab, scroll down and tap **Check Out**.

2. A Visit Summary shows the following information during your client visit:

- Client name
- Task completed with a green checkmark ✅ (uncompleted task will show a red X ❌.) You have the option to go back to the task list and check off an item you may have missed by tapping **Back**.
- The not completed reason and not completed notes display next to the task.
- Mileage entered.

(*Note - the Not Completed Reason "Other" prints as "Not Completed")

3. Tap **Next**.

**Note**: If you do not enter a reason for not completing a task, the Next button will not be active and you must go back to the task list and specify a not completed reason for a frequency task(s). Tab on the "Click here" link to return to the Schedule Tasks and provide documentation.

**MatrixCare** ⟳ ❓ 🔔3 👤

## Visit Summary
Bodden, Anne

**☰ TASKS**

- ✅ Bathing - Tub/Shower
- ✅ Assist with Dressing
- ✅ Assist with Feeding
- ✅ Assist with Toileting

**💲 EXPENSES**

9 Miles

Back      Next

4. The Visit Summary Review page shows your GPS location results status. You must certify the visit time is accurate by reviewing the Check In and Check Out times. Tap **Yes** or **No** to certify the visit times.

5. If the caregiver answers **Yes**, the Notes field is optional, and the caregiver can tap **Next** to continue the check out.

6. If the caregiver answers **No**, the Notes field and at least one of the Override Time field is required to be filled in before continuing to complete the visit.
   - In the Notes field, the caregiver is required to explain why they answered No.
   - The Notes field has a maximum of 500 characters.
   - The caregiver is required to enter an Override Time for the Check In and/or Check Out field.
   - The **Next** button will not be enabled until the required fields are entered.

**Important!** The Check In and Check Out clock time picker can be different depending on the user interface of your device.

7.  Tap **Next.**



8.  Enter your 4-digit Caregiver PIN. **Important**: The 4-digit Caregiver PIN is the same as your Passcode.

    **Note**: If you forgot your caregiver PIN, tap **Skip**.

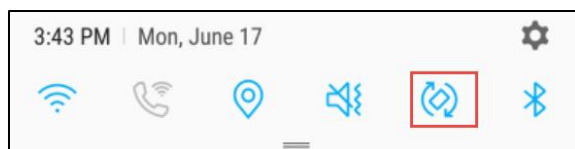9.  Tap **Next.**

10. Scroll to the bottom of the page, rotate the device and tap on the **Capture Signature** pane.

     **Note**: You may have to tap the rotate button on your device to capture a signature.

11. Ask the client to sign on the line with their finger or provide a stylus for them to sign on the signature pane.

**Note**: If the client cannot sign in the pane, tap **Skip** or contact your Home Care Agency office for authorization options.



12. After signing Tap **OK**.
13. Scroll down and tap **Accept**.
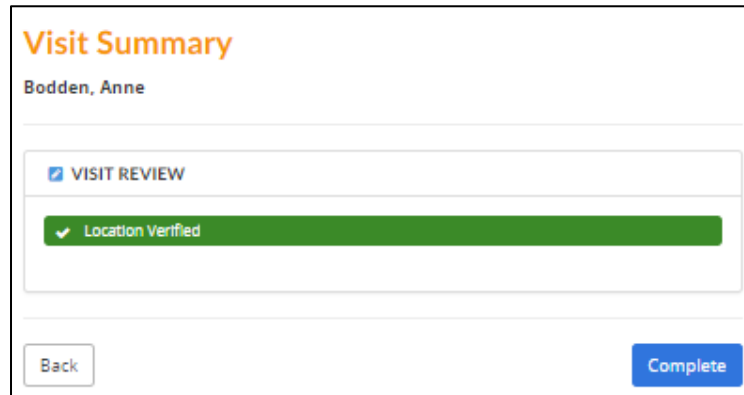
14. Tap **Complete** to record the checkout. A sync will automatically run and you can continue to work in the app.

    **Note**: Check out times that were not overwritten will continue to increment until Complete is tapped. Override times will not keep incrementing.

15. A message stating Record Created Successfully, and you have successfully checked out. Tap **Home** to return back to the Home page.

**Note**: If the back-office user modifies the schedule in a way that requires the client to sign a new Daily Visit Sheet, then the Caregiver would go back to the client on their next visit and have the client sign again for the previous visit. The changes the back office made to the schedule will be visible to the client and caregiver on the caregiver's device. Tap the **Client Signature** button on your checked out schedule to obtain the client signature on the bottom of the Appointment tab.



This would create a second, versioned Daily Visit Sheet for that visit. When running the Daily Visit Sheet report from Office Schedules, the most current version of the report is returned.

## Viewing Schedule Details when Checked Out of a Schedule

When viewing the Tasks tab on a Checked Out schedule, notes and measurements entered for a task by the Caregiver will be displayed on the right side of the task pane. Notes longer than 140 characters will display a "Show More" link to expand to see the full note, (up to 1,000 Characters) and then a "Show Less" link to collapse it back. There is no editing on tasks when the Schedule is checked out.

# Re-entering Your Login Credentials

For security reasons, periodically you will be prompted you to re-enter your login credentials when the application attempts to sync. (An example of when this happens is when your refresh token expires.) At this time, the MatrixCare Sign in page displays. Enter your username, password, and assigned tenant code, and tap **Sign In**. You are then returned to the app and it will continue the sync, and you can continue working.

Notes:

- You must log into the mobile app with your username and password every 15 days to keep your credentials current.

- If you close the Sign In page without entering your username and password, you will see the message "Your session has expired, and you must re-login to perform a sync". Tap **Sync** and the Sign In page will appear for you to sign in.

- If you enter a different username or tenant code than is currently installed on the device, when you return to the app you see the message "This is not the current user. Log in with *tenantcode/*username". You must tap **Sync** again and sign in as the user that is specified in the message, to be able to sync. You can keep working in the app without syncing before re-entering your credentials.

# Closing the Mobile App

To close the mobile app, tap the Recent Apps or Home button, then either tap the X in the top right-hand corner of the app, or swipe it off the screen.

# Troubleshooting Tips

**Installation Page Appears to be Frozen**

**Problem** - Initial MatrixCare for Home Care app installation appears frozen after re-entering the passcode.

**Corrective Action** - This may occur on a Pixel or OnePlus phone running Android version 9. The problem is the pop-up is not displayed in front of the passcode page, and it is waiting for a response. To see the prompt, tap the main button to display open apps (Home or Recent apps), then tap on the MatrixCare for Home Care app to maximize it. The app displays with the "Allow **Home Care** to access this device's Location?" prompt. Tap **Allow**, and the installation will proceed.
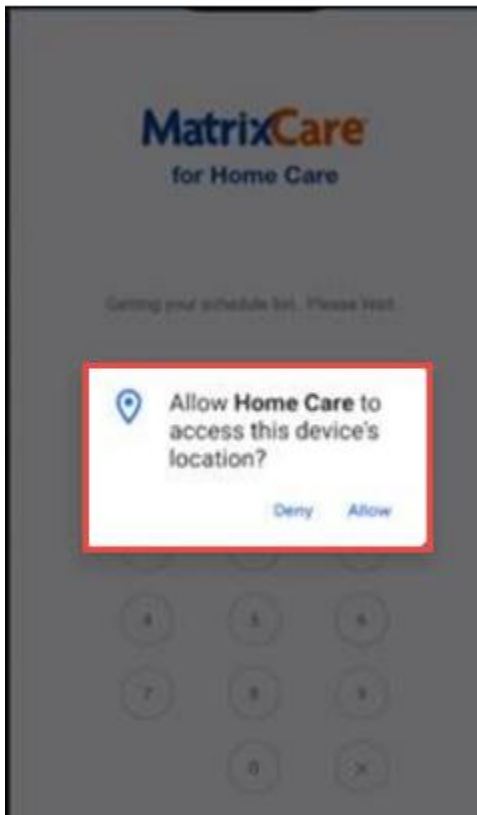
## There appears to be a problem . . .

The user's phone the message "There appears to be a problem . . ." displays during a sync with a Check-out or Client Signature And the checked-out schedule in the back office does not have a Daily Visit Sheet

**Problem -** Below is one known cause for this scenario.

Have the caregiver try the Corrective Action and verify on the next check-out or client signature if it is resolved and the Daily Visit Sheet is in the back office. If it is not resolved, obtain information for troubleshooting and escalate. (username, schedule id)

This will occur if the caregiver changes their passcode/pin from someplace other the app installed on their phone.

When the app is installed on your phone, and you create your passcode, that passcode is set as your digital signature pin.

The passcode is stored on your phone and used to validate the caregiver pin during checkout.

If the passcode/digital pin is changed somewhere other than on that device, this scenario will occur (example: after installing the app, the caregiver later changed her pin on the web app).

When the caregiver checks-out of a schedule they enter their pin. The pin must match the passcode stored on their device, or they will see the validation message "invalid pin".

During checkout, the caregiver enters the pin that is stored on their phone and it validates successfully.

But when that pin was changed from somewhere other than that phone - when the checkout is synced - the message "There appears to be a problem. Please try again or contact your agency administrator" will display during the sync.

In the back office the schedule will show the departure call and the task entries, but there will not be a Daily Visit Sheet.

**What To Do -** On their phone, on the "Enter Passcode" page, use the Forgot Passcode? link to reset their passcode/pin. After the passcode is reset on the device, new check-outs and new client signatures will show a Daily Visit Sheet in the Back Office.

This will not affect prior schedules with missing Daily Visit Sheets.
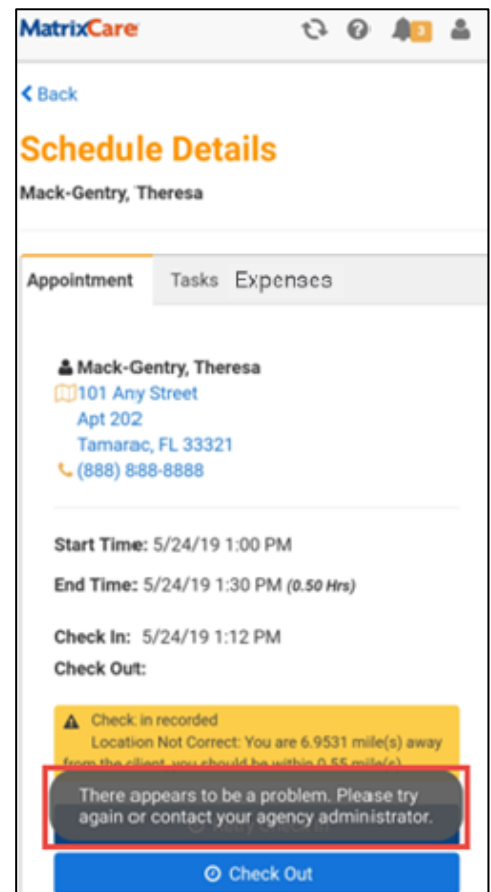
**Other Instances of the Message "There appears to be a problem . . ."Displaying During a Sync**

**Problem** - A message appears during a sync "There appears to be a problem. Please try again or contact your agency administrator"

**What this means:** This message occurs when a check-in or check-out out was not able to be updated into the back office during a sync.

**What the caregiver should do:**

Call your agency administrator and let them know you saw that message.

If possible, let the administrator know:

- what schedule you were on
- what date and time you saw the message (the date/time of the sync)
- what type of phone you have (ie: Galaxy S9, LG Stylo 4, iPhone XR, etc.)

The administrator should call MatrixCare Support with the username that got this message, along with the other information.

Development will access the sync log for additional information and troubleshooting.
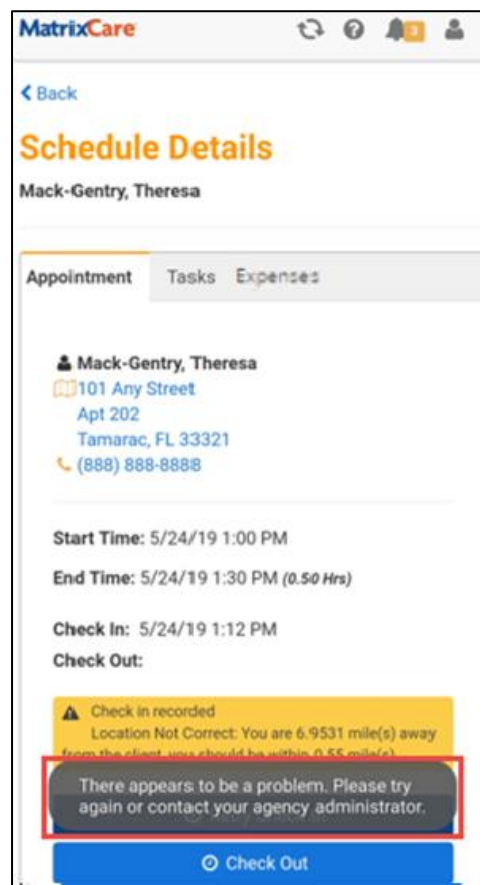
## Secure Storage Not Possible

**Problem** - When signing in for the first time during the initial installation, a message displays Secure Storage Not Possible. This device does not appear to support secure storage. Please make sure that your device passcode has been set.

**Corrective Action** - Go into Settings and set a device/lock screen passcode. Then re-install the application and sign in. **Note**: You <u>MUST</u> reinstall the application to be able to save your work.

**Note**: This message may display on a Galaxy S6 or other devices, when a device passcode is not set.

## During Check-out, the Client Signature Page does not rotate when I turn the phone

**Problem** - When checking out, the Client Signature page will not rotate when the phone is rotated.

**Corrective Action** - Go into Settings and tap the Auto-Rotate button to set it to On.

**Note**: The location of the Auto-Rotate button may be different on different phone models.



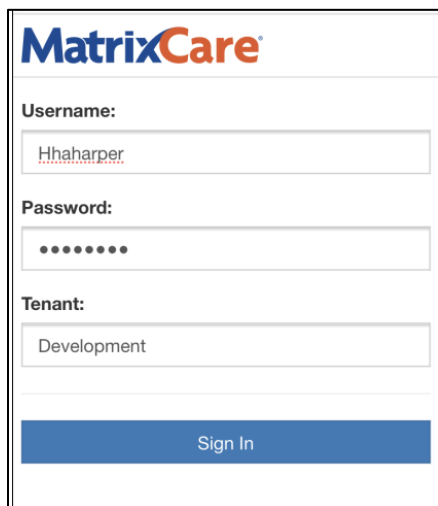© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only
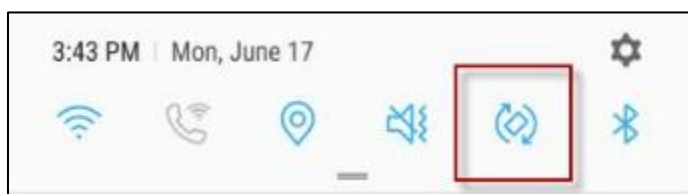
## When the device tries to sync, it takes me to the page to enter my Username and Password

For security reasons, users will periodically be prompted to re-enter their login credentials when the application attempts to sync.

An example of when this happens is when the refresh token expires - which is every 15 days.

At this time, the MatrixCare Sign in page displays, and the user enters their username, password, and tenant code, and presses **Sign In**.

They are then returned to the app and it will continue the sync, and they can continue working.

**MatrixCare**

Username:

Hhaharper

Password:

••••••••

Tenant:

Development

Sign In

**When the Device Tries to Sync, a message "This is not the current user. Log in with. . .**

For security reasons, users will periodically be prompted to re-enter their login credentials when the application attempts to sync. (An example of when this happens is when your refresh token expires.)

At this time, the MatrixCare Sign in page displays, and the user enters their username, password, and tenant code, and taps **Sign In**.

They are then returned to the app and it will continue the sync, and they can continue working.

**Problem** - If the user enters a **different** valid username or tenant code than is currently installed on their phone, when they return to the App, they will see this message displaying the Tenant Code / Username that are installed on the device.

**Corrective Action** - Tap the Sync button, and the MatrixCare Sign in page will display. Sign in with the username and tenant code that is installed on the device and that displayed in the message. **Note**: you can continue working in the app without syncing before re-entering your credentials.
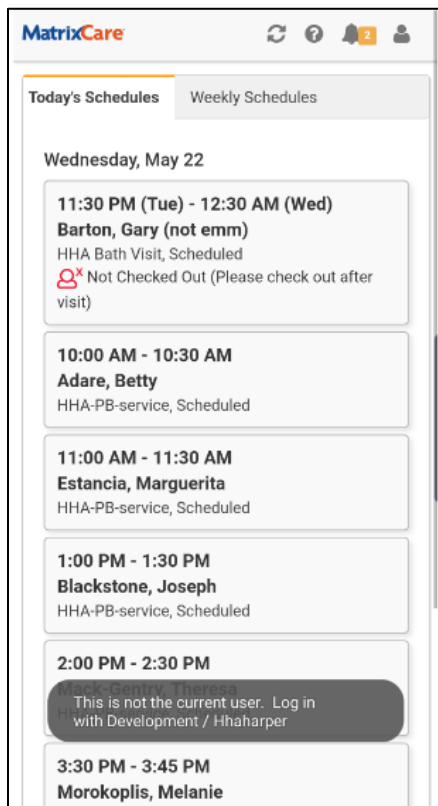
## Sync Failure. Try Again Later

**Problem** - The user was not assigned a Permission Group and signed into the app and saw a blank home page. The permission group was added, but now when they sign back into the app they get a Sync Failure message.

**Corrective Action** - When the caregiver opens the app, press the Forgot Passcode? link on the Enter Password page and enter their username and password and create a new passcode (it can be the same passcode).
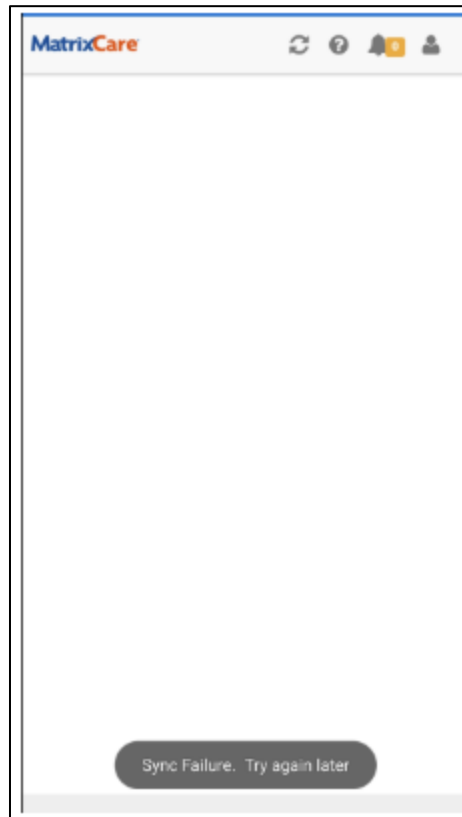
## Something went wrong attempting to setup the app. Please try again. Or Your caregiver record is not setup correctly

During Installation a message displays "Something went wrong attempting to setup the app. Please try again. Contact support if this problem persists." In R10 the message will display as "Your caregiver record is not setup correctly, please contact your office."

The message will display after the user has signed in with their username and password, and created their passcode.

**Problem** - In the back office, in the caregiver's User Settings > Security tab - This User Maps To: Entity Type = Caregiver. Could be currently mapped to either Entity Type = None or Staff.

**Corrective Action** - On the Caregiver record>Main tab - the Role must be either Caregiver or Caregiver/Staff. (not "Staff"). Set the User Maps To: Entity Type Caregiver on the caregiver record. Have the user open the app and sign in again.

In version R9, the message displays as:



In version R10, the message displays as:
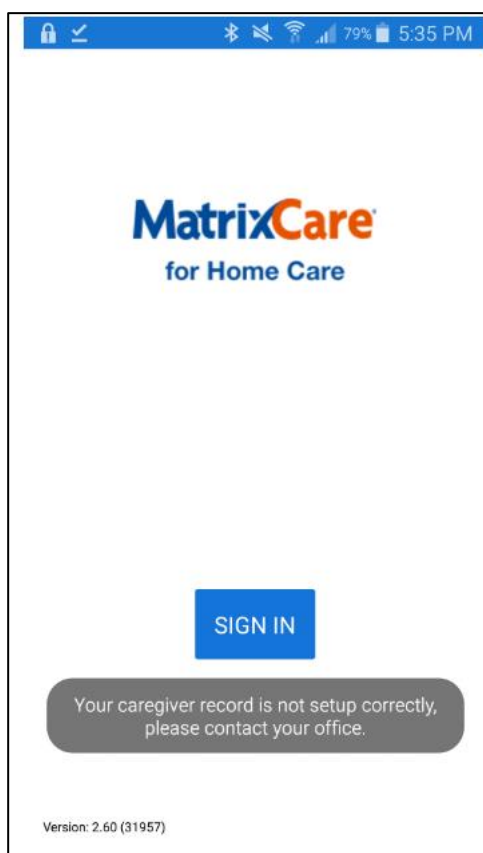
The following shows where the Entity Type and Role settings are in the Home Care backoffice.