



# RegistryConnect Training

## RegistryConnect Configuration

# RegistryConnect Settings Configuration

Before importing or adding clients and caregivers in RegistryConnect, selecting your settings and configuration preferences are crucial to the smooth operation of RegistryConnect for your business

**System  
Defaults**

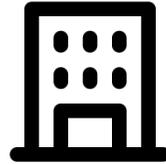
**Menu  
Dropdowns**

**Communication  
Setup**

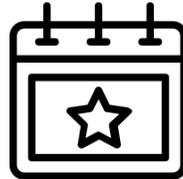
**User  
Management**

# System Defaults

***System defaults control how RegistryConnect operates to reflect your business operations.***



Identify registry offices & zones



Set up schedule and holiday settings



Configure overtime settings



Select fields to edit / show / hide

# System Defaults



## Primary & Additional Offices

Enter the registry office information on the Primary Office tab under Registry Info. Additional office locations can be added on the Additional Offices tab.

### Configuration Notes

- The email address entered will be used for customer service communications, as well as for billing information.
- The tax ID and last month of the fiscal year will be set up by AssuriCare

Home Scheduler Clients Caregivers Referral Sources Reports Tasks Me 1 Settings

Registry Settings

- Registry Info 2
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging
- Registry Logo
- Maintenance
- Users & Roles
- Reminders
- Client Services
- ClockWork/EVV
- Export Configurations
- Invoicing
- Insurance Billing
- Assessments

Registry Info

Primary Office Additional Offices Client Face Sheet

Company:\* Helping Hand

Address: 2651 1st Ave S

Address 2:

City: St Petersburg State/Pr: Florida Postal Code: 33712

Email: m.craig@assuricare.com

Comment:

Phones Tip: dbl-click line item to edit phone. Drag & Drop to reorder.

Prior...	Name	Number	Memo
No phones found.			

Tax ID: 123457896

Last Month of Fiscal Year: January

3 4

# System Defaults



## Client Face Sheet

The Client Face Sheet allows registries to design and customize an information sheet on an individual client to provide to registry staff or caregivers.

### Configuration Notes

- Check off the fields that you would like to be included on the Client Information Sheet and click the save button
- The Name Format dropdown allows you to pick how you would like the client name to show on the Client Face Sheet

The screenshot displays the 'Client Face Sheet' configuration interface. The left sidebar shows a tree view under 'Registry Settings', with 'Registry Info' selected. The main panel has tabs for 'Primary Office', 'Additional', and 'Client Face Sheet'. A form contains the following fields and options:

- Name Format: Full Name (dropdown)
- Client Id:
- Address:
- Phone Number:
- Gender:
- Birth Date:
- Social Security:
- Marital Status:
- Admit Date:
- Service Period:
- Client Type:
- Gender Preference:
- Subscribers:
- Primary Caregiver:
- Special Needs:
- Primary Doctor:
- Diagnosis:
- Contacts:
- Directions:
- Billing Id:

\* required 🗑️ read only

# System Defaults



## Registry Configuration

The Registry Configuration tab sets some of the most basic settings for your registry.

### Configuration Notes

- *Disable Needs v. Skills* – when unchecked a warning generates if a caregiver does not have a skill that the client needs when assigning the visit
- *Keep Assignments* – when checked, visits scheduled during any entered unavailability for the caregiver show as a conflict
- *Skip Adjacent Visits* – when unchecked, the scheduler will receive a conflict alert for back to back visits for the caregiver
- *Enforce Unique Caregiver Email* – check your state Medicaid regulations if this should be enabled



The screenshot shows the 'Registry Configuration' tab in the AssuriCare system. The interface includes a navigation menu on the left with items like Registry Settings, Registry Info, Configuration, Zones, Client Types, Field Setup, Skill Levels, and Skill Type. The main content area is titled 'Configuration' and contains various settings. Red callouts 1 through 7 point to specific elements: 1 points to the 'Settings' tab, 2 to the 'Configuration' menu item, 3 to the 'Registry Configuration' sub-tab, 4 to the 'Time Zone' dropdown, 5 to the 'External Name Format' dropdown, 6 to the 'Enforce Unique Caregiver Email' checkbox, and 7 to the save icon. Two purple text boxes provide additional context: one explains the importance of selecting the primary time zone and whether to enable auto-generated IDs, and the other explains that the External Name Format controls how names appear on reports for HIPAA compliance.

**1** Settings

**2** Configuration

**3** Registry Configuration

**4** Time Zone: (UTC-05:00) Eastern T

**5** External Name Format: Full Name

**6** Enforce Unique Caregiver Email

**7** Save icon

Select the primary time zone for the registry and select whether you would like auto-generated client and caregiver IDs. Terms for client, caregiver, and visit can also be updated

The External Name Format controls how client and caregiver names will show up on reports for HIPAA compliance. Select whether you would like to use client and caregiver prospects.

Configuration

Registry Configuration

Time Zone: (UTC-05:00) Eastern T

Auto Client ID:  Enabled Next Number: 25

Auto Caregiver ID:  Enabled Next Number: 27

Term for Client: Client

Term for Staff: Caregiver

Term for Visit: Visit

Disable Needs vs Skills:

Keep Assignments:

Skip Adjacent Visit Check:

Default Area Code: 727

Date Format: MM/DD/YYYY (USA)

Travel Time Code: 29002 Reimbursement

Travel Mileage Code: 29000 Mileage

Errand Mileage Code:

Screen Caregiver Name:

Use Sales Tax:

Use Reduce By Minutes:

External Name Format: Full Name

Use Client Prospects:

Use Caregiver Prospects:

Review Visits:

Enforce Unique Caregiver Email:

Address:

# System Defaults



## Schedule Configuration

Schedule configuration is where you set the defaults for your schedule in Registry Connect, including holidays, overtime, and display settings.

### Configuration Notes

- Holiday and OT settings apply to non-AssuriCare payment processing.
- For AssuriCare payment processing clients, work with your AssuriCare Account Manager to ensure proper configuration of holidays and OT.

1 Settings

2 Configuration

3 Schedule Configuration

4 Week Start Day: Monday

5 Holidays:

Holiday Name	Date ↑	Starts	Ends
New Year's Day	Mon 01/01/2018	12:00 AM	11:59 PM

6 Overtime Threshold/Day: 8  
Overtime Threshold/Week: 40  
Overtime Type: Traditional

7 Default Visit Start Time: 6:00 AM  
Sch. Display Start Time: 6:00 AM  
Sch. Display End Time: 11:30 PM  
Sch. Use Stop Time:   
Default Visit Duration: 04:00  
Desired Hours Alt view:   
Show Weekly Hours On Monthly:

8 Save

The week start day must be Monday for the AssuriCare payment process

Select dates to add to the holiday table. The dates entered here will show in red on the schedule. However, adding holidays here does not add them to holidays in AssuriCare's payment processing system. Work with your account manager to add them there.

Select your overtime settings. Any time above the hours entered in a day or any time above the hours entered in a week will count as overtime. Traditional OT will aggregate overtime across all clients for a caregiver, whereas Registry OT will calculate it per client.

Enter schedule defaults. Use Stop Time will show both start and end times on the scheduler. Desired Hours Alt view will show caregiver names in green if they are at or below their desired hours for a week, whereas Show Weekly Hours on Monthly will show the schedule daily hours and cumulative weekly hours for a caregiver or client when viewing the monthly schedule.

# System Defaults



## Zones

Zones are defined by the registry and are often either geographical areas or represent unique tax IDs if your registry has multiple corporate entities. Clients are assigned to one zone, whereas caregivers are assigned to any zones that they will accept assignments within. This is used to help ensure schedulers do not assign a caregiver who is not in the same zone as the client to the client's visit.

### Configuration Notes

- To use AssuriCare payment processing, each zone must be hooked up to our payments platform. For clients who are not utilizing our payments platform, they must be in a separate zone.

The screenshot shows the AssuriCare system interface. The navigation menu at the top includes 'Home', 'Scheduler', 'Clients', 'Caregivers', 'Referral Sources', 'Reports', 'Tasks', 'Me', and 'Settings' (1). The sidebar on the left shows 'Registry Settings' with sub-items: 'Registry Info', 'Configuration', 'Zones' (2), 'Client Types', 'Field Setup', 'Skill Levels', 'Skill Type', 'Text Messaging', and 'Registry Logo'. The main content area shows the 'Zones' sub-menu (5) with a 'Save' icon and a 'New' icon (3). Below this is a table with the following data:

Zone Code	Description
E	East
N	North
S	South
W	West

A red box highlights the table area (4). A red 'X' icon is visible in the bottom right corner of the table.

# System Defaults



## Client Types

Client Types are used to indicate the payer source. When creating a visit, the client type will show in the “subscriber” field to indicate how the visit should be billed.

### Configuration Notes

- Client Types cannot be deleted after they have been used.
- Reports can be customized or filtered by client type.
- Common types include Private Duty, Medicaid, and LTCI. Most clients will be Private Duty.

Client Type Code	Name	Active	
Private	Private Duty	✓	
Medicaid	Medicaid	✓	
LTCI	LTCI	✓	
		✓	✗

# System Defaults



## Field Setup

Field Setup allows you to determine which fields on certain Caregiver and Client record tabs you would like to be editable, required, read only, or hidden.

### Configuration Notes

- Fields marked as not used will not show on the tab or in any reports.
- Tool Tips show as hover hints to remind the user when completing those fields about what the field is used for.

Field Setup

Role: Client Tab Location: Private

Order	Field Name	Setting	Tool Tip
1	Referring Doctor	Available	
2	Birth Date	Available	
3	Gender	Required	
4	Ethnic Origin	Available	
		Available	
		Not Used	
		Available	
		Not Used	
		Available	
13	Advanced Directives	Available	
14	Medicaid ID	Available	

Select whether you want to edit the fields on Caregiver or Client record tabs and then select the tab. For each field, you can enter a Tool Tip and determine whether the field is editable (Available), required, ready only, or hidden (Not Used).

# System Defaults



## Registry Logo

If desired, you can upload your registry's logo to display in RegistryConnect.

### Configuration Notes

- To add a logo, click Select Photo and select your logo from your computer files. Click Upload to save the logo in RegistryConnect.
- Note that the format must be jpeg or png.
- This will show on any manually generated invoices as well.

The screenshot shows the RegistryConnect interface with the 'Settings' tab selected. The left sidebar contains a tree view under 'Registry Settings' with 'Registry Logo' highlighted. The main content area is titled 'Registry Logo' and contains the following elements:

- Instructions:** File size limit is 2 mb. Height on banner resized to 30 pixels.
- Photo File:** A text input field with a 'Select photo' button to its right.
- Buttons:** 'Upload' and 'Reset' buttons at the bottom right of the form.

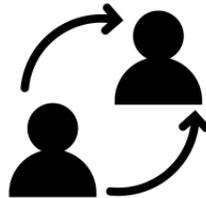
Red callout boxes with numbers 1, 2, and 3 point to the 'Settings' tab, the 'Registry Logo' menu item, and the 'Instructions' text, respectively.

# Menu Dropdowns

***You can customize the dropdown menus across the platform to reflect the common options that your business uses***



Set user contact types



Manage referral source options



Curate cancellation and discharge options

# Menu Dropdowns

## Registry Tables: Contact Relationship

Various kinds of contacts can be saved in a Client or Caregiver's "Contacts Tab"; the Contact Relationship tab in Maintenance Settings allows you to enter in contact types that are available to those Clients and Caregivers.

### For Example...

- Contact Relationship types can include Spouse, Care Monitor, Mother / Father, Son / Daughter

Tip: Drag & Drop to reorder.

Description	Active
Spouse	✓
Mother	✓
Daughter	✓
Son	✓
Father	✓
Neighbor	✓

# Menu Dropdowns

## Registry Tables: Cancellation Comments

Cancellation comments are required whenever a visit is cancelled. The Cancellation Comments table allows registries to manage the available comments associated with visit cancellation.

### Configuration Notes

- Additional Cancellation Comments can be added from this table after setup.

The screenshot shows the 'Registry Tables' configuration page. The 'Settings' menu item is highlighted with a red box and a '1' callout. The 'Registry Tables' section is expanded, showing 'Cancellation Comments' selected with a red box and a '3' callout. The 'Add', 'Delete', and 'Save' buttons are highlighted with purple callouts. The table lists various cancellation reasons with 'Active' checkboxes and delete icons.

Description	Active	
Hospital	✓	✗
Patient refused service	✓	✗
Patient not home	✓	✗
MD Appointment	✓	✗
Patient out of town	✓	✗
Patient has visiting family	✓	✗

# Menu Dropdowns

## Registry Tables: Referral Types

Registries can track the type of referrals received through Referral Types, Company Types, and Referral Sources. Here you can add or edit current Referral Types

The screenshot shows the AssuriCare configuration interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, and Settings. The left sidebar shows a tree view of Registry Settings, Maintenance, and Registry Tables. The Registry Tables list includes items like Advanced Directives, Cancellation Comments, Requested Service Categories, Client Priority, Company Types, Contact Relationship, Counties, Discharge Comments, Ethnic Origin, Languages, Referral Types, and Religious Preferences. The 'Referral Types' item is selected, opening a configuration window. This window has a toolbar with Save, Add, and Delete buttons. Below the toolbar is a table with columns for Description and Active. The table contains one row: 'Paid Internet Referral' with the Active checkbox checked. A tip at the top right of the window says 'Tip: Drag & Drop to reorder.'

### Configuration Notes

- Referral types is the broadest category for tracking referrals. Examples could include "Internet" or "Community Living."
- These can then be narrowed further by company type which might be "Internet -> Social Media" or "Community Living -> Assisted Living Facility"
- At the lowest level is the referral source, which might be "Internet -> Social Media -> Facebook" or "Community Living -> Assisted Living Facility -> Shady Pines."

# Menu Dropdowns

## Registry Tables: Company Types

Set the company-type designation options available when entering referral sources. These serve as a further narrowing down of the Referral Types category.

### For Example...

- Company Types can include hospitals, assisted living facilities, social media, or radio stations.

The screenshot displays the AssuriCare software interface. At the top, a navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (1), and Settings (1). The 'Settings' tab is active. On the left, a sidebar menu shows 'Registry Tables' selected, with a red box and a '2' callout. Below it, 'Company Types' is also selected, with a red box and a '3' callout. The main content area, titled 'Registry Tables', lists various settings: Advanced Directives, Cancellation Comments, Requested Service Categories, Client Priority, Company Types (selected), Contact Relationship, Counties, and Discharge Comments. A red box and a '4' callout highlight the 'Company Types' entry. A red box around the main content area contains a 'Save' button, an 'Add' button (with a plus icon), and a 'Delete' button (with a minus icon). A table below shows a single entry: 'Internet' with a checkmark in the 'Active' column and a red 'X' in the 'Delete' column. A tip at the top right of this area reads 'Tip: Drag & Drop to reorder.'

# Menu Dropdowns



## Referral Sources

You can create a list of referral sources to track how clients or caregivers come to your registry. The referral source will show on the client and caregiver records to tag each as to how they were referred (if applicable).

### Configuration Notes

- Both Company Types and Referral Types need to be defined in the Registry Tables before adding a Referral Source
- An example of a referral source could be Sally Smith, a former caregiver.

1 Settings

2 Referral Sources

3 Add

4 New Referral Source

The referral type and company type drop down menus must be configured before adding referral sources

Last Name	First Name	Referral Type	Email	Company	Phone	Active
Bloom	Alex	Professional Referral		Bloom Senior Living	(888) 888-8888	✓
Barker	Bob	Professional Referral		Summerville Geriatric Care Partners		✓

New Referral Source

Personal Notes History

Referral Type: \*

First Name: Middle: Last: Suffix: Credentials:  Active

Company: Company Type:

Address:

Address 2:

City:

State/Pr: Postal Code:

Email:

Phones

Tip: dbl-click line item to edit phone. Drag & Drop to reorder.

Prior...	Name	Number	Memo
No phones found.			

\* required

Save Save & Close Cancel

# Menu Dropdowns



## Registry Tables: Skills

Use the Skills tab to manage a list of various “skills” available to add to Caregiver’s accounts. These skills will also be entered as available options on a Client’s record to be used for cross-referencing Caregivers and Clients.

### Configuration Notes

- If “Disable Skills v. Needs” is checked in the Registry Settings area, there will be no limitations on assigning Caregivers to Clients based on matching skills.

The screenshot shows the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a red callout '1'), and Settings (highlighted with a red box). The left sidebar shows a tree view of the application structure, with 'Registry Tables' highlighted (red callout '2') and 'Skills' selected at the bottom (red callout '3'). The main content area is titled 'Registry Tables' and contains a list of various registry tables. The 'Skills' table is highlighted with a red box (red callout '4'). The Skills table has columns for 'Description' and 'Active'. The table contains the following data:

Description	Active
Alzheimer's	✓
Diabetic Care	✓
Hoyer Lift	✓
Lifting	✓

At the top of the Skills table, there are three action buttons: 'Add' (purple callout), 'Delete' (purple callout), and 'Save' (purple callout). A tip at the top right of the table reads 'Tip: Drag & Drop to reorder.'

# Menu Dropdowns

## Registry Tables: Removal Reason

When removing a Caregiver from a Registry, the option will be available to leave a Removal Reason. Use the Removal Reason table to curate a list of selectable reasons.

### For Example...

- Some examples of removal reasons include:
  - Asked to be removed from Registry
  - Moved
  - Certifications Lapse

The screenshot shows the AssuriCare web application interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Mess, and Settings. The Settings menu is highlighted with a red box and a callout '1'. The left sidebar shows a tree view of settings, with 'Registry Tables' highlighted by a red box and callout '2'. The 'Removal Reasons' table is highlighted by a red box and callout '3'. The table has columns for Description, Active, and a delete icon. The rows are: 'Asked to be removed from Registry', 'Moved', 'Violation of Policy', and 'Certifications Lapse'. The 'Delete' button is highlighted with a red box and callout '4'. The 'Save' and 'Add' buttons are also visible.

Description	Active	
Asked to be removed from Registry	✓	✗
Moved	✓	✗
Violation of Policy	✓	✗
Certifications Lapse	✓	✗

# Menu Dropdowns



## Discharge Reasons

The Discharge Reasons table contains approved discharge reasons that are used when a Client is *ending* service. Reasons can be added, edited, or deleted here.

Description	Code	Active	Delete
Expired Hospital	2	✓	✗
Expired	20	✓	✗
Expired at Home	40	✓	✗
Expired Hospital, SNF, ICF	41	✓	✗
Expired Place Unknown	42	✓	✗
Left Against Advice	7	✓	✗
Routine Discharge	1	✓	✗

# Menu Dropdowns

## Registry Tables: Discharge Comments

Discharge comments are required whenever a Client is discharged. The Discharge Comments table allows registries to manage the available comments associated with Client discharge.

### Configuration Notes

- Additional Discharge Comments can be added from this table after setup.

The screenshot displays the AssuriCare web application interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a notification badge '1'), and Settings (highlighted with a red box and a callout '1'). The left sidebar shows a tree view with 'Registry Tables' selected (callout '2'). The main content area is titled 'Registry Tables' and lists various table types: Advanced Directives, Cancellation Comments, Requested Service Categories, Client Priority, Company Types (callout '4'), Contact Relationship, Counties, Discharge Comments (highlighted with a red box and callout '3'), and Ethnic Origin. Above the table list are 'Save' and 'Add' buttons. Below the list is a table with columns 'Description' and 'Active'. The table contains two rows: 'Deceased' and 'Moved out of Service Area', both with a checkmark in the 'Active' column and a red 'X' in a delete column. A 'Delete' button with a callout 'Delete' and a red arrow points to the delete column. A tip at the top right of the table reads 'Tip: Drag & Drop to reorder.'

Description	Active	
Deceased	✓	✗
Moved out of Service Area	✓	✗

# Menu Dropdowns Optional Tables

***In addition to the primary tables we recommend, you can customize these optional tables to provide drop downs for information on the Client and Caregiver records***



Add Personal and Private information options



Set Client Disaster Priority



Manage Client Diagnosis Codes



Add language, religious preference, and ethnicity options

# Menu Dropdowns (Optional)

## Registry Tables: Advanced Directives

Items entered in the Advanced Directives table will be used from a Client's "Private" Tab to help designate preferred care. Items entered here also appear on the Client Record page.

### For Example...

- Types of Advanced Directives could include:
  - POA
  - DNR
  - HealthCare Surrogate

The screenshot displays the AssuriCare web application interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a red notification bubble labeled '1'), and Settings. The left sidebar shows a tree view with 'Registry Settings' and 'Maintenance' folders. Under 'Maintenance', 'Registry Tables' is highlighted with a red box and a red callout bubble labeled '3'. Below it, various code categories are listed. The main content area is titled 'Registry Tables' and has a red box around it. It contains a list of registry tables: 'Advanced Directives' (highlighted with a red box and a red callout bubble labeled '4'), 'Cancellation Comments', 'Requested Service Categories', 'Client Priority', 'Company Types', 'Contact Relationship', 'Counties', 'Discharge Comments', 'Ethnic Origin', and 'Languages'. Above the table are 'Save' and 'Add' buttons. Below the table are 'Add' and 'Delete' buttons. The table itself has columns for 'Description', 'Active', and a checkbox. The rows listed are: Power of Attorney, Full Code, DNR, Living Will, and Medical Power of Attorney. A tip at the top right of the table says 'Tip: Drag & Drop to reorder.'

Description	Active	
Power of Attorney	✓	✗
Full Code	✓	✗
DNR	✓	✗
Living Will	✓	✗
Medical Power of Attorney	✓	✗

# Menu Dropdowns (Optional)



## Diagnosis Codes

Registries can search ICD codes, published by CMS, and add them to the Diagnosis Codes table. The contents of this table are used in the dropdown list found on the Client record.

### Configuration Notes

- The diagnosis description can be modified if desired.
- If preferred, a registry may enter diagnosis free-form text description.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, and Settings. The Settings tab is highlighted with a red circle and the number '1'. The left sidebar shows a tree view of configuration options, with 'Diagnosis Codes' highlighted by a red circle and the number '2'. A purple callout 'Add' with an arrow points to the 'Add' icon in the table header. A red circle with the number '3' is placed next to the 'Adjustment Codes' menu item. The main content area shows a search bar, a 'Show Inactive' checkbox, and a table with columns 'DX Code' and 'Description'. The table currently displays 'No diagnosis codes found.' A purple callout 'Search and Clear Search' points to the search bar area.

# Menu Dropdowns (Optional)

## Registry Tables: Client Priority

The Client Priority table is used by Registries to classify disaster priority for Clients, as is required in some states. This is intended to prioritize those who need care the most.

### Configuration Notes

- If a Registry had a Caregiver shortage due to a natural disaster, this would inform them which clients cannot go without help.

Tip: Drag & Drop to reorder.

Description	Active	Delete
Priority 1 Must have care no other available	✓	✗
Priority 2 Other caregiver available in emergency	✓	✗
Priority 3 Family in home w/notice will provide	✓	✗

# Menu Dropdowns (Optional)



## Registry Tables: Counties

The Counties table allows you to set options available to use under a Client's "Personal Tab" when setting up or editing their information.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a notification count of 1), and Settings (highlighted with a red box and callout 1). The left sidebar menu shows 'Registry Settings' and 'Maintenance' categories. Under 'Registry Tables', the 'Counties' item is highlighted with a red box and callout 3. Other items in the sidebar include Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes, Note Types, Type Of Service, Discharge Reasons, and Document Categories. The main content area, titled 'Registry Tables', lists various tables: Advanced Directives, Cancellation Comments, Requested Service Categories, Client Priority (highlighted with callout 4), Company Types, Contact Relationship, Counties (highlighted with callout 3), Discharge Comments, and Ethnic Origin. Above the table, there are icons for Save, Add, and Delete, with purple callouts pointing to them. The table itself has columns for 'Description' and 'Active'. One row is visible: 'Middlesex County' with a checkmark in the 'Active' column and a red 'X' delete icon. A tip at the top right of the table area reads 'Tip: Drag & Drop to reorder.'

# Menu Dropdowns (Optional)

## Registry Tables: Ethnic Origin

Use the Ethnic Origin tab to curate a list of available ethnicities to add to a Client or Caregiver's record.

The screenshot displays the AssuriCare software interface. At the top, a navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a notification badge '1'), and Settings (highlighted with a red box). Below this is a left-hand navigation menu with categories like Registry Settings and Maintenance. Under Registry Settings, the 'Registry Tables' option is highlighted with a red box and a red callout '2'. In the main content area, the 'Registry Tables' section is active, showing a list of various registry categories. The 'Ethnic Origin' category is selected and highlighted with a red box and a red callout '3'. To the right of the 'Ethnic Origin' category, there are icons for 'Save', 'Add', and 'Delete' (with a red callout '4'). Below these icons is a table with the following data:

Description	Active	
African American	✓	✗
Hispanic	✓	✗
Native American	✓	✗
Chinese	✓	✗
Caucasian	✓	✗

A tip at the top right of the table area reads: "Tip: Drag & Drop to reorder."

# Menu Dropdowns (Optional)



## Registry Tables: Languages

Use the Languages tab to curate a list of available languages to add to a Client or Caregiver's record.

The screenshot shows the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a notification badge '1'), and Settings (highlighted with a red box and a callout '1'). The left navigation menu includes Registry Settings, Maintenance, Registry Tables (highlighted with a red box and callout '2'), Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes, Note Types, Type Of Service, Discharge Reasons, Document Categories, GL Codes, and Users & Roles. The main content area is titled 'Registry Tables' and contains a list of registry table categories: Advanced Directives, Cancellation Comments, Requested Service Categories, Client Priority (callout '4'), Company Types, Contact Relationship, Counties, Discharge Comments, Ethnic Origin, Languages (highlighted with a red box and callout '3'), and Referral Types. The 'Languages' table is displayed with columns for Description, Active, and a delete icon. The table contains the following data:

Description	Active	
German	✓	✗
English	✓	✗
Spanish	✓	✗
French	✓	✗
Russian	✓	✗
Vietnamese	✓	✗

At the top of the table, there are icons for Save, Add, and Delete (with a callout 'Delete'). A tip at the top right of the table reads 'Tip: Drag & Drop to reorder.'

# Menu Dropdowns (Optional)

## Registry Tables: Religious Preferences

Use the Religious Preferences tab to curate a list of available religions to add to a Clients record.

The screenshot shows the AssuriCare web application interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages (with a notification badge '1'), and Settings. The left sidebar contains a tree view of menu items: Registry Settings, Maintenance, Registry Tables (highlighted with callout '2'), Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes, Note Types, Type Of Service, Discharge Reasons, Document Categories, GL Codes, Users & Roles, and Reminders. The main content area is titled 'Registry Tables' and contains a list of menu items: Advanced Directives, Cancellation Comments, Requested Service Categories, Client Priority, Company Types (highlighted with callout '4'), Contact Relationship, Counties, Discharge Comments, Ethnic Origin, Languages, Referral Types, and Religious Preferences (highlighted with callout '3'). The 'Religious Preferences' sub-menu is open, showing a table with the following data:

Description	Active	
Catholic	✓	✗
Mormon	✓	✗
Jewish	✓	✗
Protestant	✓	✗
Non-Denominational	✓	✗

Callouts: 1. Settings tab; 2. Registry Tables menu item; 3. Religious Preferences sub-menu item; 4. Company Types menu item. The interface also includes 'Save', 'Add', and 'Delete' buttons, and a tip: 'Tip: Drag & Drop to reorder.'

# Communication Setup

***Communication Setup controls how RegistryConnect communications to clients, caregivers, and AssuriCare will operate***



Create reminders for client tasks & caregiver tasks



Design document categories



Configure note types



Build default text messages for available visits

# Communication Setup



## Text Messaging

With RegistryConnect you can send text messages to caregivers to offer them visits. You can customize the text message language, as well as set forwarding schedules for replies to those messages to go to a specific registry staff member by email. This page is also used to set Out of Office text responses that are sent to Caregivers attempting to communicate with a Registry after hours.

### Configuration Notes

- The text message language saved here will become the default message, but when you send out individual messages you will have the option to change it for that individual.

Home Scheduler Clients Caregivers Referral Sources Reports Tasks Me **1** Settings

Registry Settings

- Registry Info
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging** **2**
- Registry Logo
- Maintenance
- Users & Roles
- Reminders

Text Messaging

**3** Message Settings Forward

Do not delete the text highlighted in yellow. This will populate with the visit information when a text message is sent

Visit Accepted: Thank you for accepting %p @ %v. Please call the office or check your app for additional details.

Visit Not Available: Thank you but the visit is no longer available %p @ %v We will contact you with other opportunities as they become available.

\* required 📄 read only

Home Scheduler Clients Caregivers Referral Sources Reports Tasks Me **1** Settings

Registry Settings

- Registry Info
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging** **2**
- Registry Logo
- Maintenance
- Users & Roles
- Reminders
- Client Services
- ClockWork/EVV
- Export Configurations

Text Messaging

**3** Message Settings **Forward Email Schedule**

From	To	Begins ↑	Ends	Email Address	Recurrence
No availability					

**4** Add New Forward schedule **5**

Start: 08/14/2020 8:00 AM

End: 08/14/2020 5:00 PM

Recurrence Email Address: \_\_\_\_\_

Add Cancel

# Communication Setup



## Client Reminders

Reminders can be created to follow up with clients for various reasons, such as a new prospect follow up, client birthday, or home visit.

### Configuration Notes

- Reminders are added on the Reminders tab of the Client record
- Required reminders will be flagged as missing if the caregiver record does not have one entered
- Reminders are **only** viewable to users who are added to the “Alert Who?” field

1 Settings

2 Client

3 Add

4 Alert Who?

**Add New Reminder Definition**

Code:\* [ ]

Description:\* [ ]

Alert Who?: None delegated

Days till warn: [ ]

Zones: All Zones

Active  Required  Show on Census Report

\* required

Add Cancel

To add multiple names, click on each name to receive the reminder.

Code	Description	Active	Required
1	General	✓	
2	Client Home Visit	✓	
3			
4			
5			

# Communication Setup



## Caregiver Reminders

Reminders are also available for caregivers. Often reminders are used to remind caregivers about the renewal of certifications.

### Configuration Notes

- Reminders are added on the Reminders tab of the Caregiver record
- Required reminders will be flagged as missing if the caregiver record does not have one entered
- Caregiver reminders can be set up with multiple steps. Steps refer to the number of reminders. For example, you could set up step one to send a 60 day reminder and step 2 to be a 30 day reminder.
- On the Setup tab, you can specify how the reminder will start and end.

Code ↑	Description	#Steps	Active	Required
1	CPR Certification	1	✓	✓
2	Criminal Background ...	1	✓	✓
3	Professional Liability I...	1	✓	
5	Driver License Renewal	1	✓	
6	CNA License Renewal	1	✓	✓

Opening Text:

The following reminder is due:

Closing Text:

Please comply with the request above immediately in order to continue to receive referrals. Please contact (555) - 555 - 5555 with any questions.

Thank you,  
Registry Administrator

# Communication Setup

## Creating a Caregiver Reminder

Creating a caregiver reminder includes adding any necessary steps.

*Sample reminder*

### Configuration Notes

- Caregiver reminders can be limited to a particular skill level
- When a reminder is entered on the Reminder tab of the Caregiver record, on the day specified the caregiver will receive the reminder with the opening and closing text defined in Setup and the memo inserted between.

**Add New Reminder Definition**

Code:\* 4

Description:\* CNA License Renewal

Alert Who?: Soulard, Raymond : Sturm, Christian

Days till warn: 2

Zones: All Zones

Skill Levels: CNA

Active  Required

Reminder Steps \*  2 Tip: dbl-click line item to edit item. Drag & Drop to reorder.

#	Description
No steps found.	

\* required

5 **Add** **Cancel**

**Add New Reminder Step**

Description: CNA License Due for Renewal

Memo to Insert:

Your CNA license is due for renewal. Please send the office an updated copy of your license

Send Reminder  Send Form

4 **Add** **Cancel**

Dear Lauren,

The following reminder is due:

Due Date	Reminder
04/29/2020	<b>Your CNA license is due for renewal. Please send the office an updated copy of your license.</b>

Please comply with the request above immediately in order to continue to receive referrals. Please contact (555) 555 - 5555

Thank you,  
Registry Administrator

# Communication Setup



## Note Types

Use the Note Types tab to add and edit customized notes pertaining to registry needs such as “General”, “Compliment”, “Complaint”, “Prospect”, and “Emergency Preparedness”.

### Configuration Notes

- The note types From AssuriCare and To AssuriCare indicate notes that will be receive or sent by AssuriCare

The "To AssuriCare" and "From AssuriCare" notes, which appear only if applicable to the registry, cannot be removed.

"Allowed Roles" dictate which types of Registry users can see certain note types.

"Can Delete" dictates which types of Registry users can delete the selected note type.

Name ↑	Code	Allowed Roles	Can Delete	Active
0-From AssuriCare	FRAC	Admin1, Default Admin	Admin1, Default Admin	✓
1-To AssuriCare	TOAC	Admin1, Default Admin	Admin1, Default Admin	✓
Billing	BILL	Admin1, Default Admin	Admin1, Default Admin	✓ ✗
Client Request	CLIENT	Default Admin		✓ ✗
Complaint	COMP	Default Admin		✓ ✗
Compliment	KUDO	Default Admin		✓ ✗
Family Request	FAMILY	Default Admin		✓ ✗
Human Resources	HR	Default Admin		✓ ✗
Other	OTH	Default Admin		✓ ✗
Payroll	PAY	Default Admin		✓ ✗

# Communication Setup



## Document Categories

The Document Categories table is used to maintain a list for classifying documents that are uploaded into the system for either Caregivers or Clients. Categorizing documents makes searching for them easier.

### Configuration Notes

- The Types of Service that are set here are used in the Charge Codes area of Maintenance Settings.

Name ↑	Allowed Roles	Active	
Licenses	Default Admin	✓	✗
Other	Default Admin	✓	
Preauthorizations	Default Admin	✓	✗
Visit	Default Admin	✓	

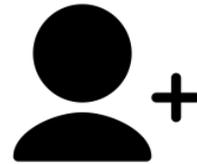
"Allowed Roles" dictate which types of Registry users can see certain Document Categories.

*User Management allows you to define user roles for your registry and create and manage new users*

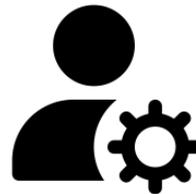
# User Management



Configure user roles and permissions



Add new users



Manage users

# User Management



## Roles

Registries can customize and create user roles to control what users can do within RegistryConnect. For example, you may not want a scheduler to view or change caregiver financial information.

### Configuration Notes

- Do not remove or change Admin1 or Default Admin.
- For users that should have access to everything, assign Admin1.
- If a user is unable to perform a specific action, it is often because the role they are in is not set up to allow it.

The screenshot shows the 'Registry Roles' configuration page. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Me, and Settings. The left sidebar shows a tree view with 'Registry Roles' selected. The main area displays a table of roles and their permissions. Callouts 1-4 highlight key features: 1. Settings tab; 2. Registry Roles in the sidebar; 3. Expanding the Scheduler role and its Caregivers sub-section; 4. The 'Add' and 'Edit' icons in the toolbar. A text box explains the 'Add' and 'Edit' icons. Another text box explains the expansion process and the meaning of 'Enabled' and 'Read Only' checkboxes.

Role : Features (expand to view)	Enabled	Read Only	Delete
Admin 1			
Caregiver View			
Default Admin			
HR			
Scheduler			
Caregivers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Caregivers Add	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Edit/View	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Financial	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Personal Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Private	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Scheduling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Registry Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Caregivers Availability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Photo	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Compliance	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers History	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Reimbursement Items	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Reimbursement Rates	<input type="checkbox"/>	<input type="checkbox"/>	
Reports	<input checked="" type="checkbox"/>		
Billing Reports	<input checked="" type="checkbox"/>		
Client Reports	<input checked="" type="checkbox"/>		
Caregiver Reports	<input checked="" type="checkbox"/>		
Management Reports	<input type="checkbox"/>		
Reimbursement Reports	<input type="checkbox"/>		
Scheduling Reports	<input checked="" type="checkbox"/>		
Settings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

# User Management



## Registry Users

You can add and update your users within the Registry Users tab. Each user will be assigned a role when created.

Last Name	First	User Name	Registry Role	Is Caregiver	Limit Zone	Active
Sauerbier	Scott	HLH.ScottS	Admin 1			✓
Soulard	Raymond	HLH.RaymondS	Scheduler			✓ ✗
Sturm	Christian	HLH.ChristianS	Default Admin			✓

### Configuration Notes

- This tab will show active users by default but checking Show Inactive will include inactive users as well.
- Registry administrators can also reset passwords or resend account emails from this tab by editing the user.
- All clients in Registry Connect must have a Case Owner assigned. If a User is going to be a Case Owner, check the “Is Case Owner” checkbox.

For active users, on the Personal Tab their password can be reset or account email resent. To make a user inactive, uncheck Active.

# User Management



## Adding a User

When adding a new user, information such as their name, email, username, birth date, and role are required.

### Configuration Notes

- The username will populate automatically based on the name entered.
- Users can be limited to a particular zone if they should only see or edit data relating to clients and caregivers assigned to that zone.

The image displays four sequential screenshots of the 'New Registry User' form, illustrating the steps to add a user:

- Step 1:** The 'Personal Info' tab is selected. Fields for First Name, Last Name, Email, and User Name are visible. A callout box states: "The username will populate based on the name entered".
- Step 2:** The 'Private' tab is selected. The 'Birth Date' field is highlighted with a callout: "The Birth Date will be used in the event of a password reset".
- Step 3:** The 'Registry' tab is selected. The 'Registry Role' dropdown menu is open, showing options: Admin 1, Caregiver View, Default Admin, HR, Scheduler, and Test Caregiver1. The 'Limit By Zone' checkbox is highlighted in yellow.
- Step 4:** The 'Zones' tab is selected. The 'Zone' field is highlighted with a callout: "If you decide to limit the user to a certain zone on the Registry tab (highlighted in yellow), select which zones the user can act within for RegistryConnect on the Zones tab".