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

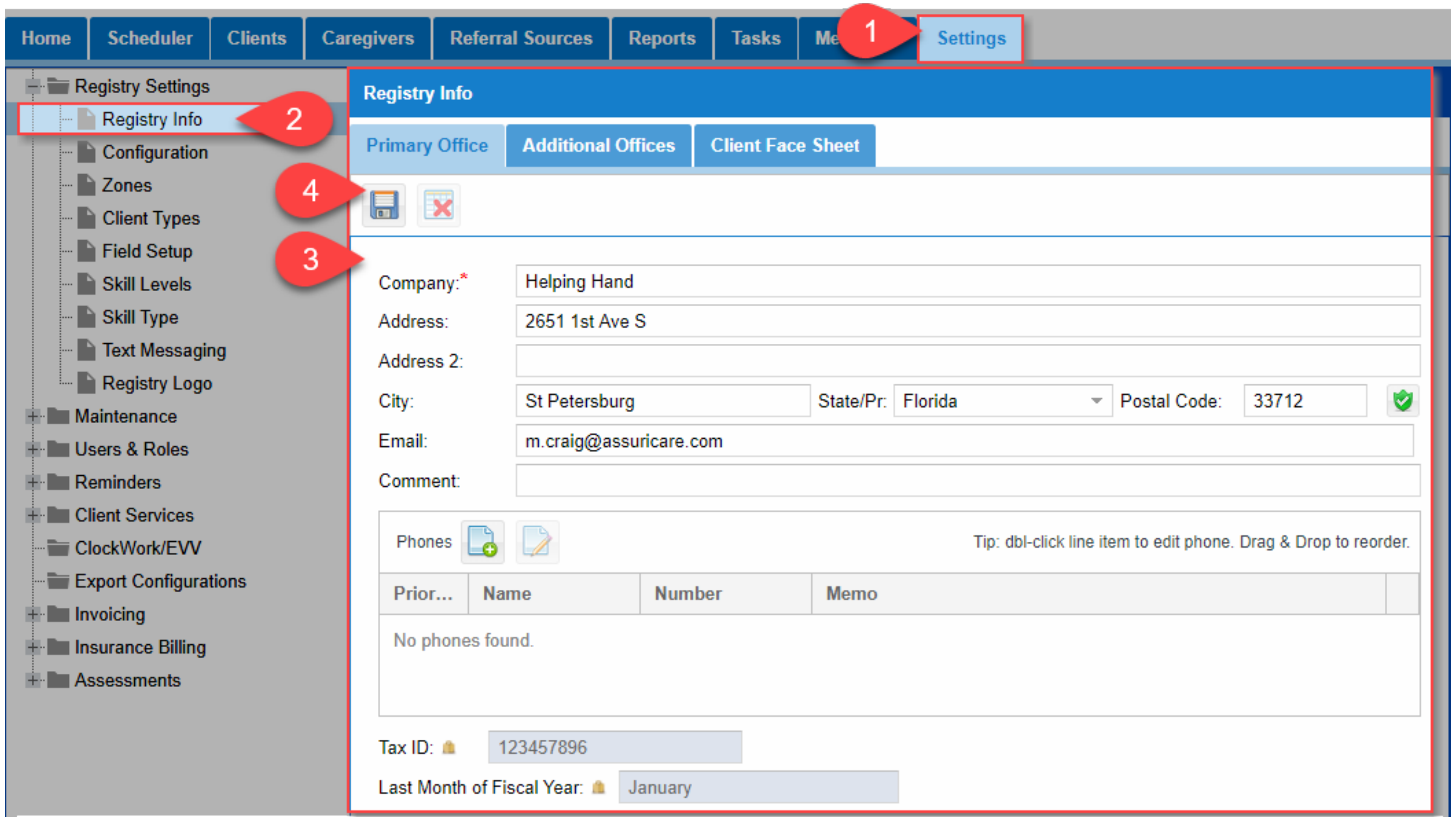
System defaults control how RegistryConnect operates to reflect your business operations.

- 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

AssuriCare

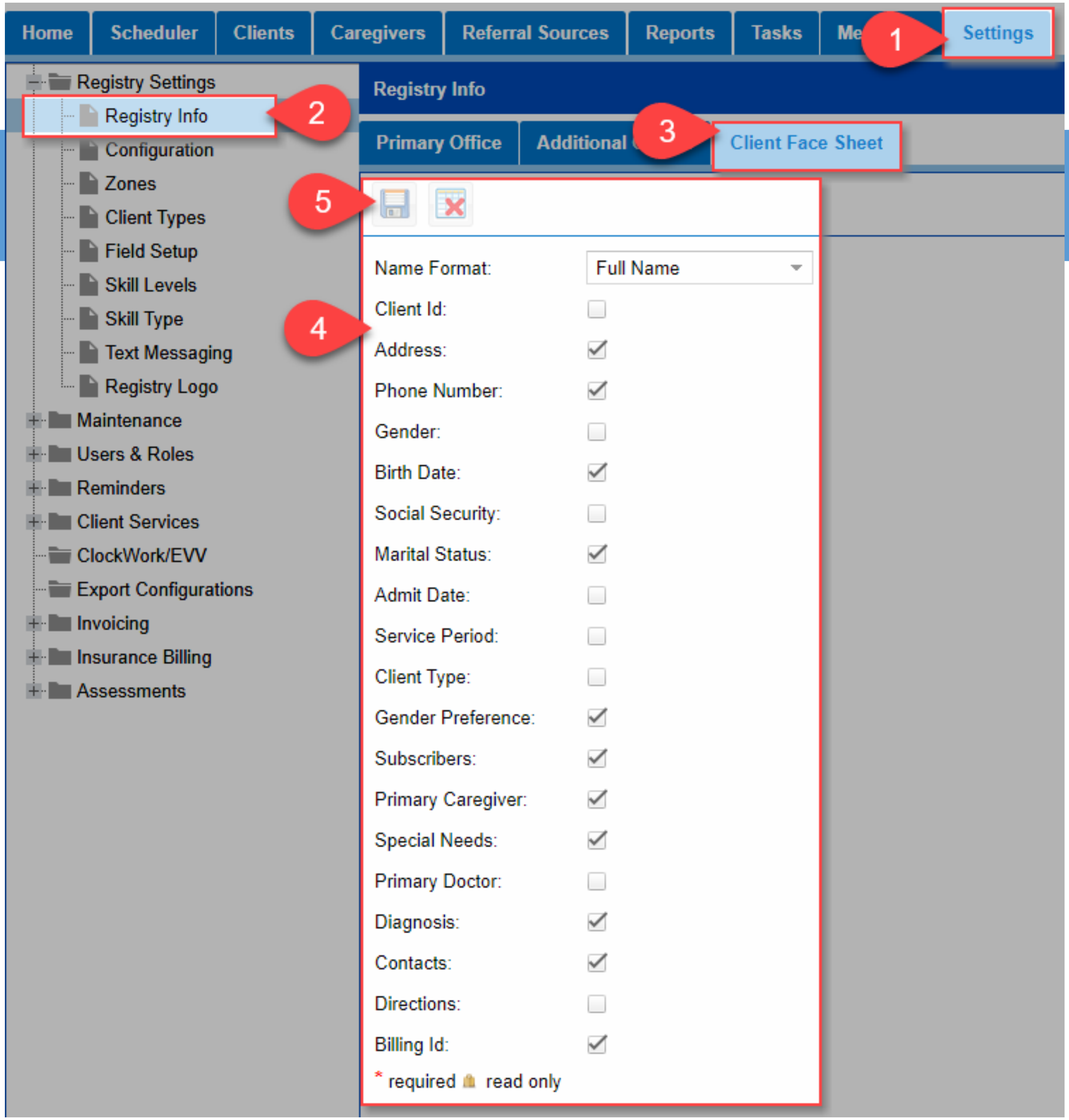
System Defaults

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



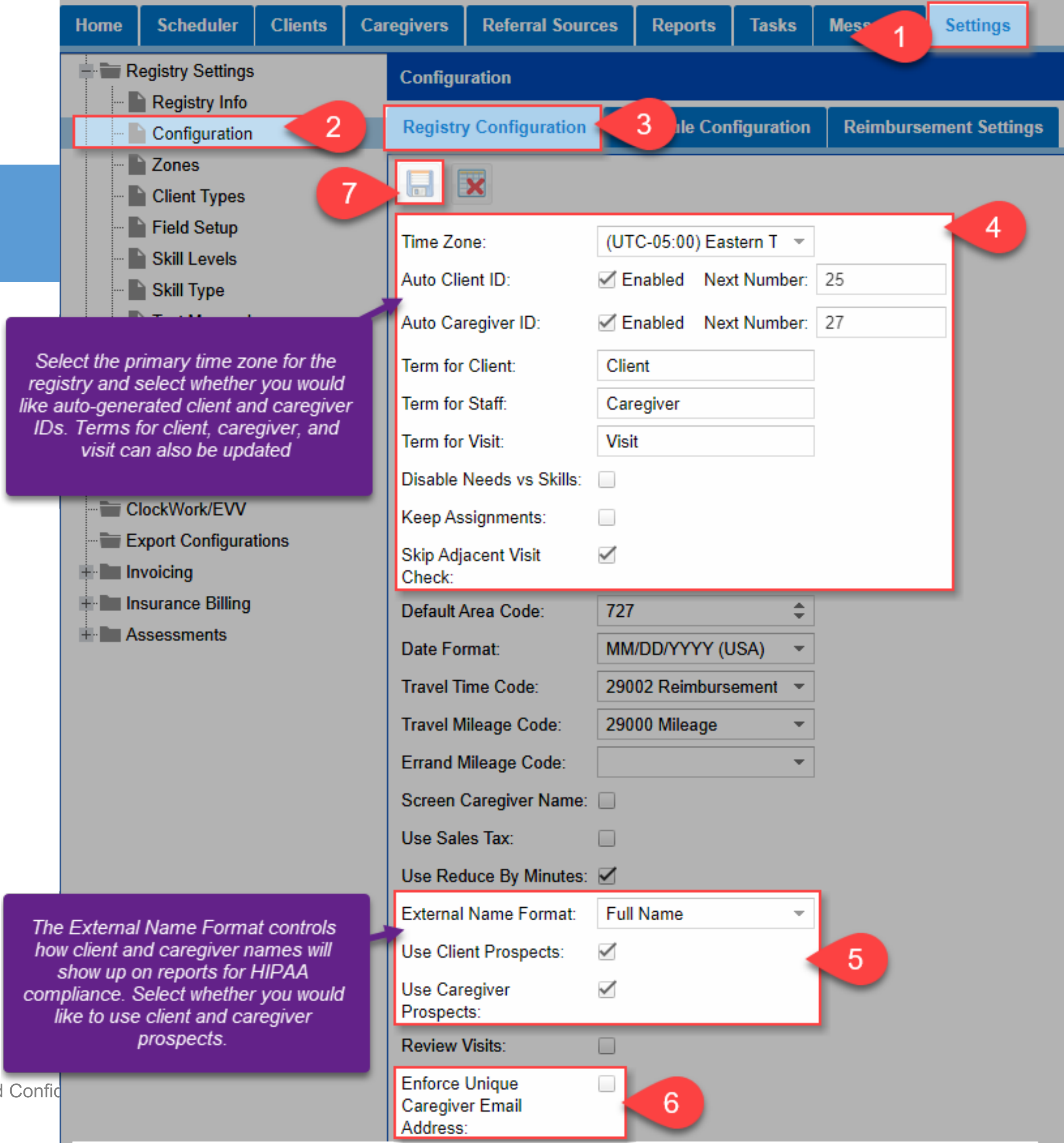
System Defaults

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



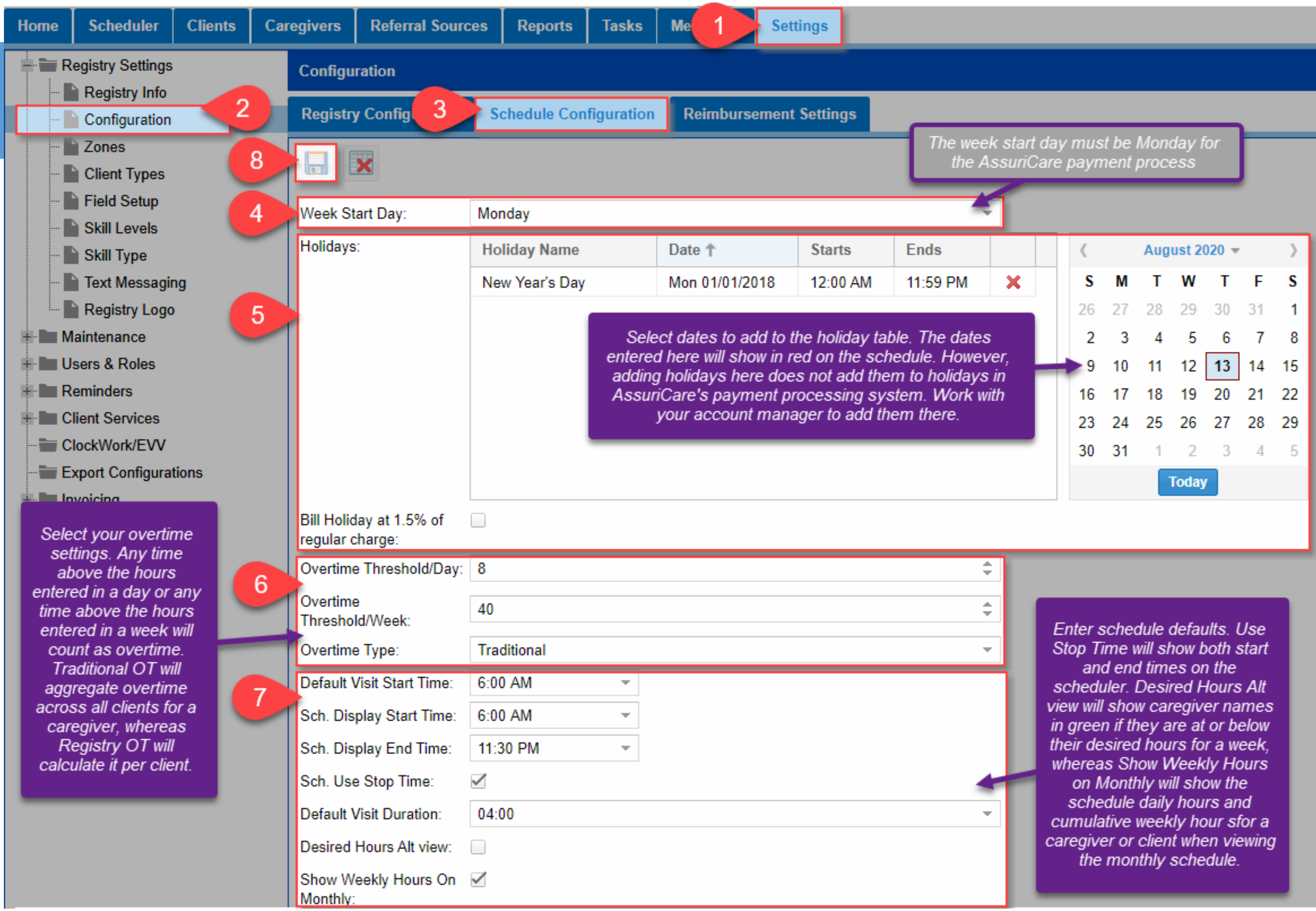
System Defaults

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.



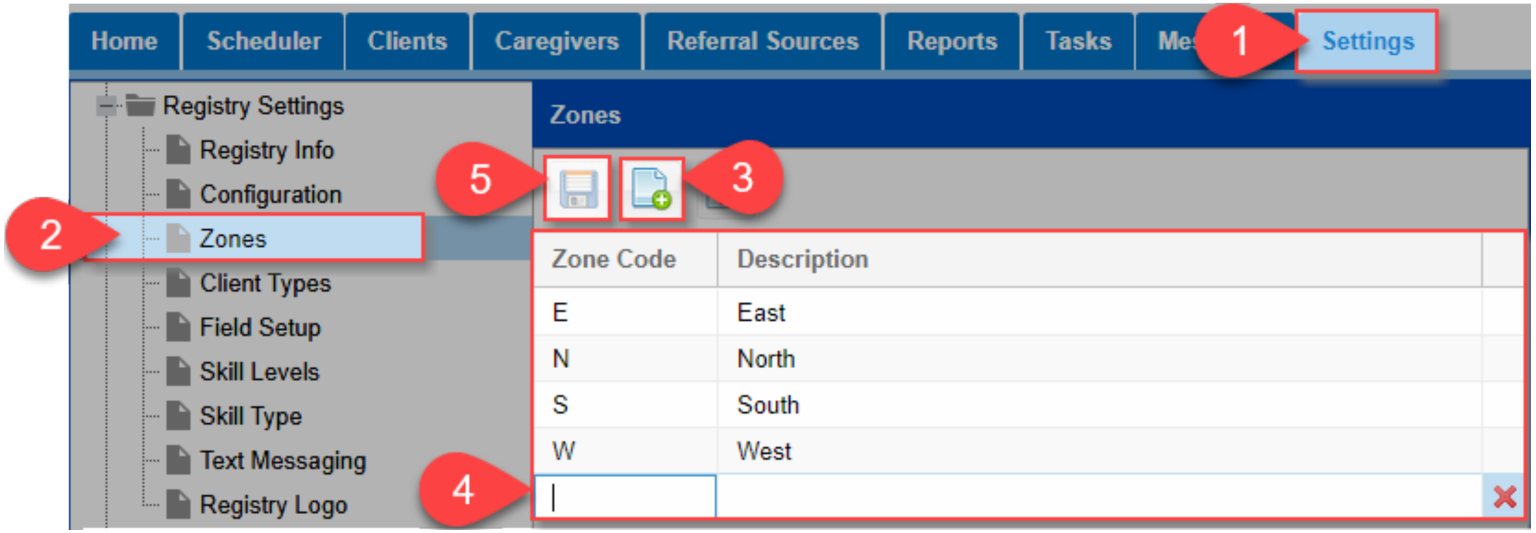
System Defaults

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 in 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.



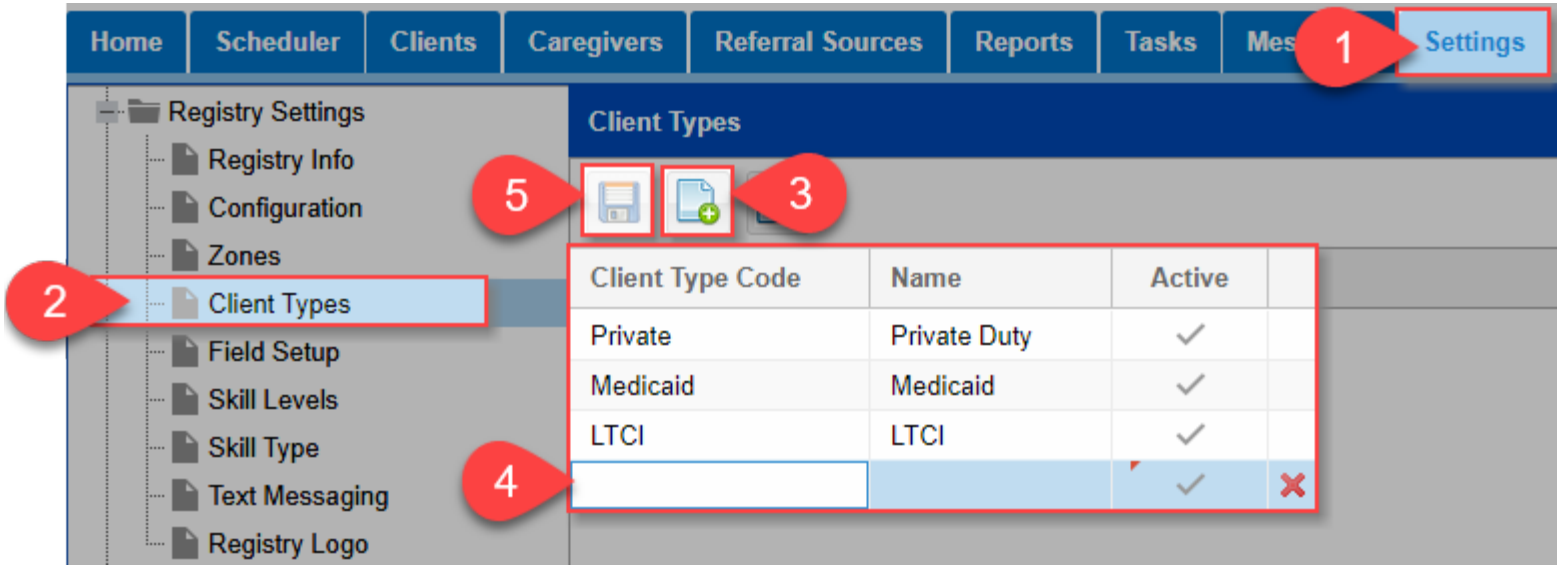
System Defaults

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.



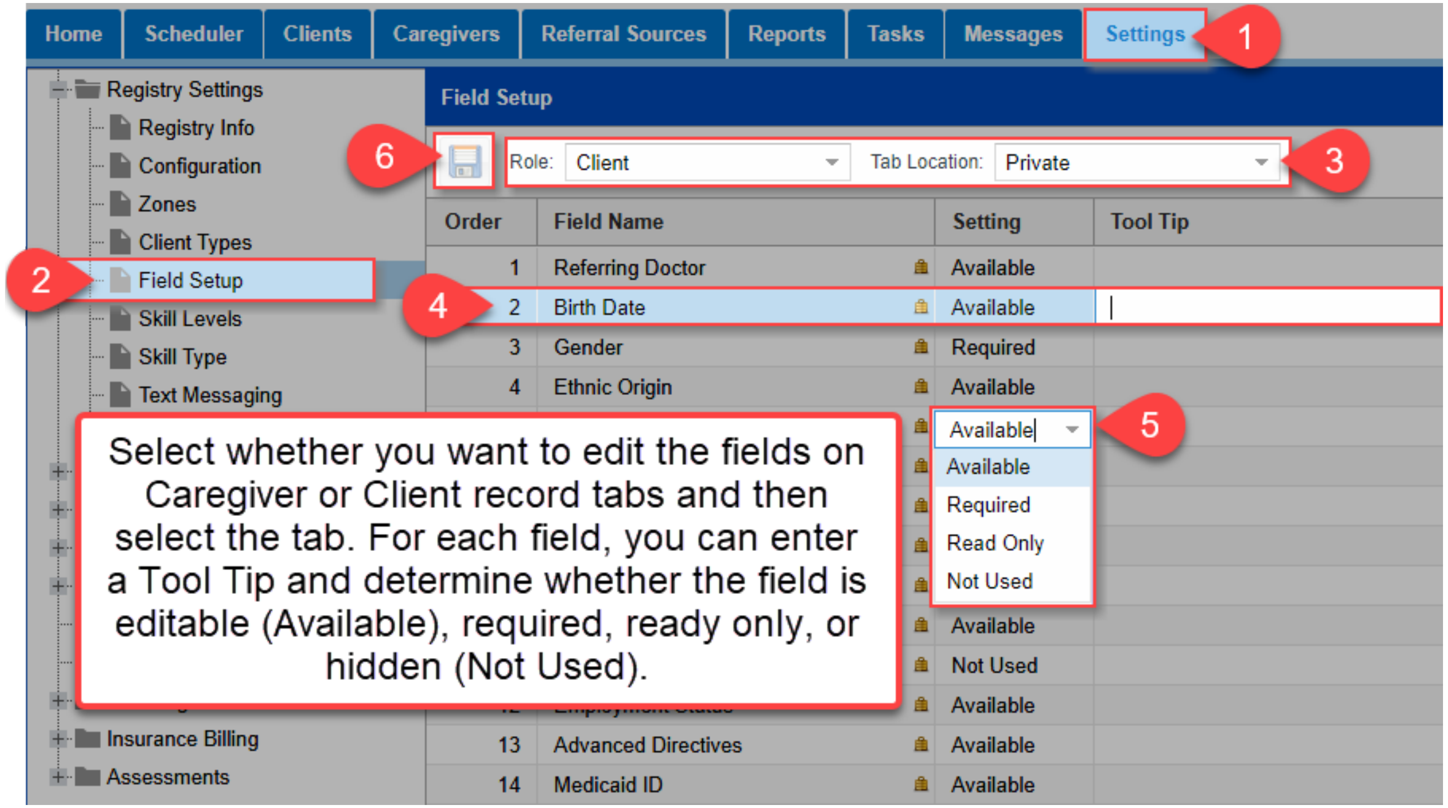
System Defaults

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.



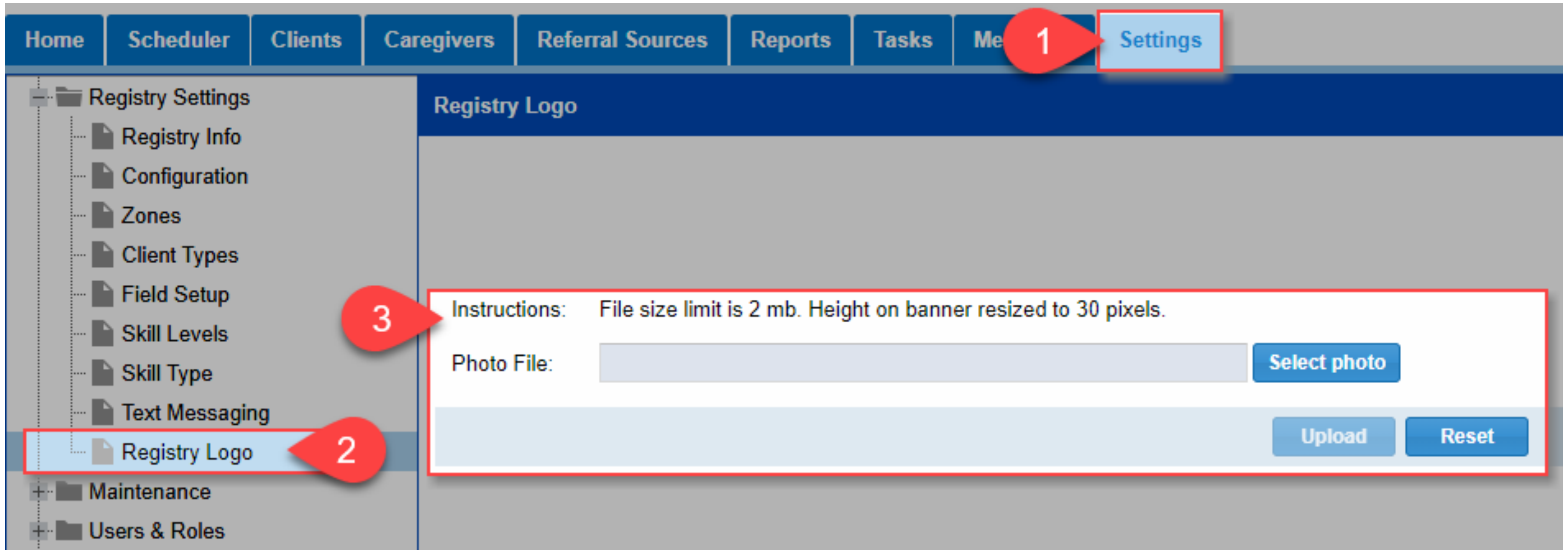
System Defaults

Registry Logo

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

Configuration Notes

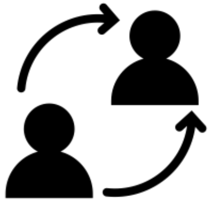
- To add a logo, click Select Photo and select your logo from your computer files. Click Upload to save the logo in RegistryConnect.
- Note that the format must be jpeg or png.
- This will show on any manually generated invoices as well.



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

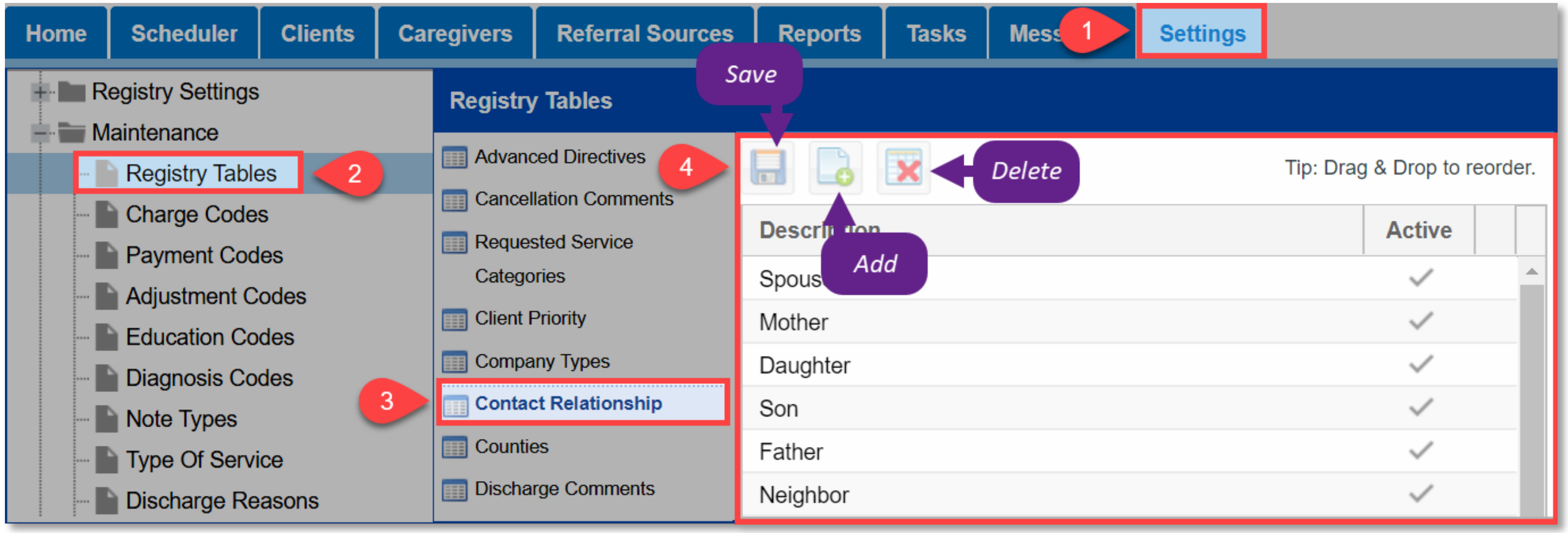
Menu Dropdowns

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



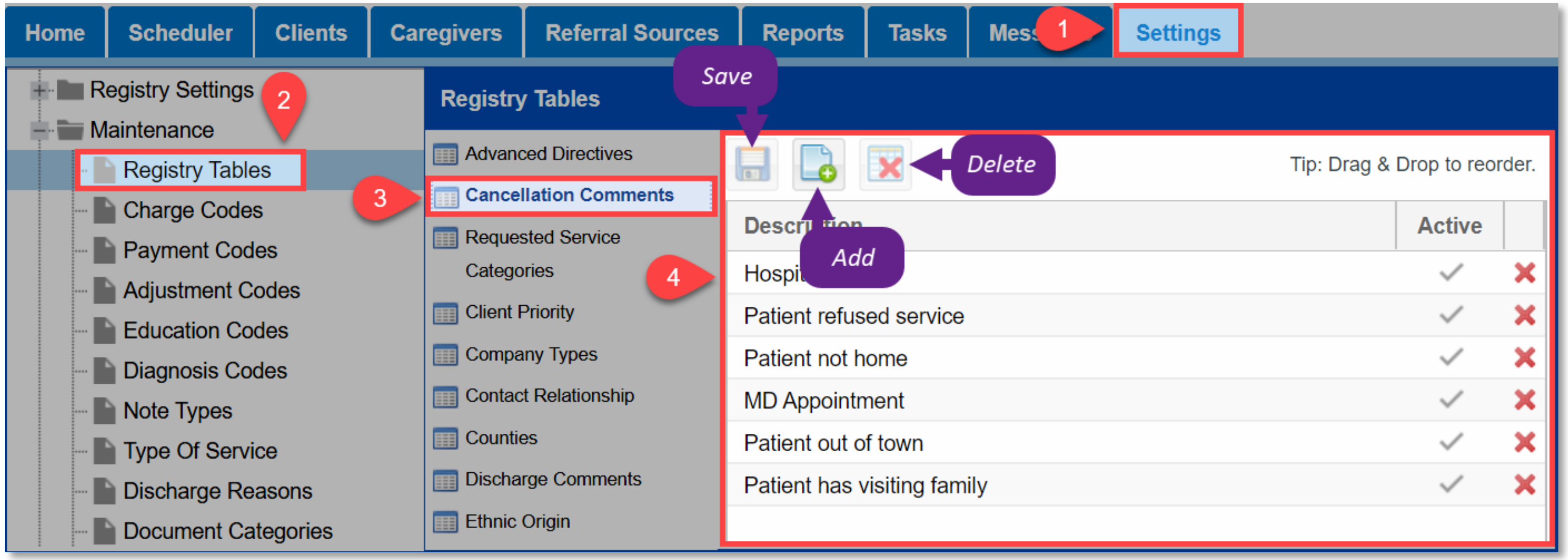
Menu Dropdowns

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

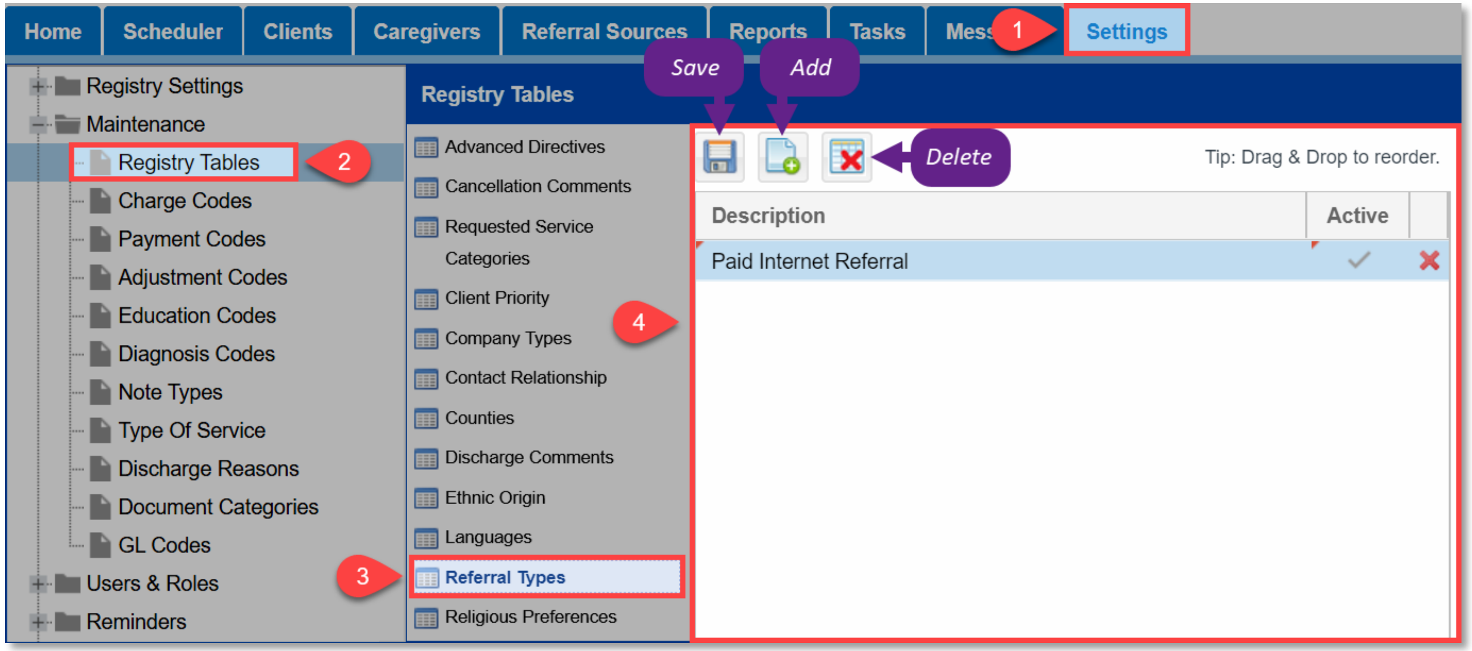
- Additional Cancellation Comments can be added from this table after setup.



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



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."

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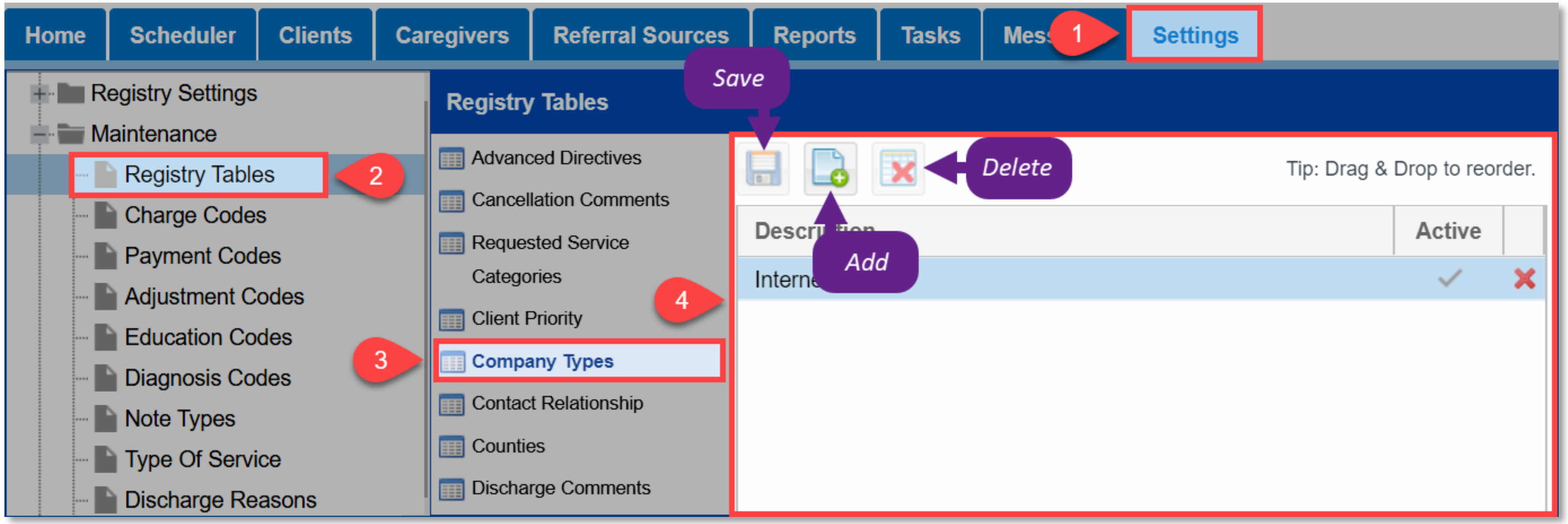
Menu Dropdowns

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…

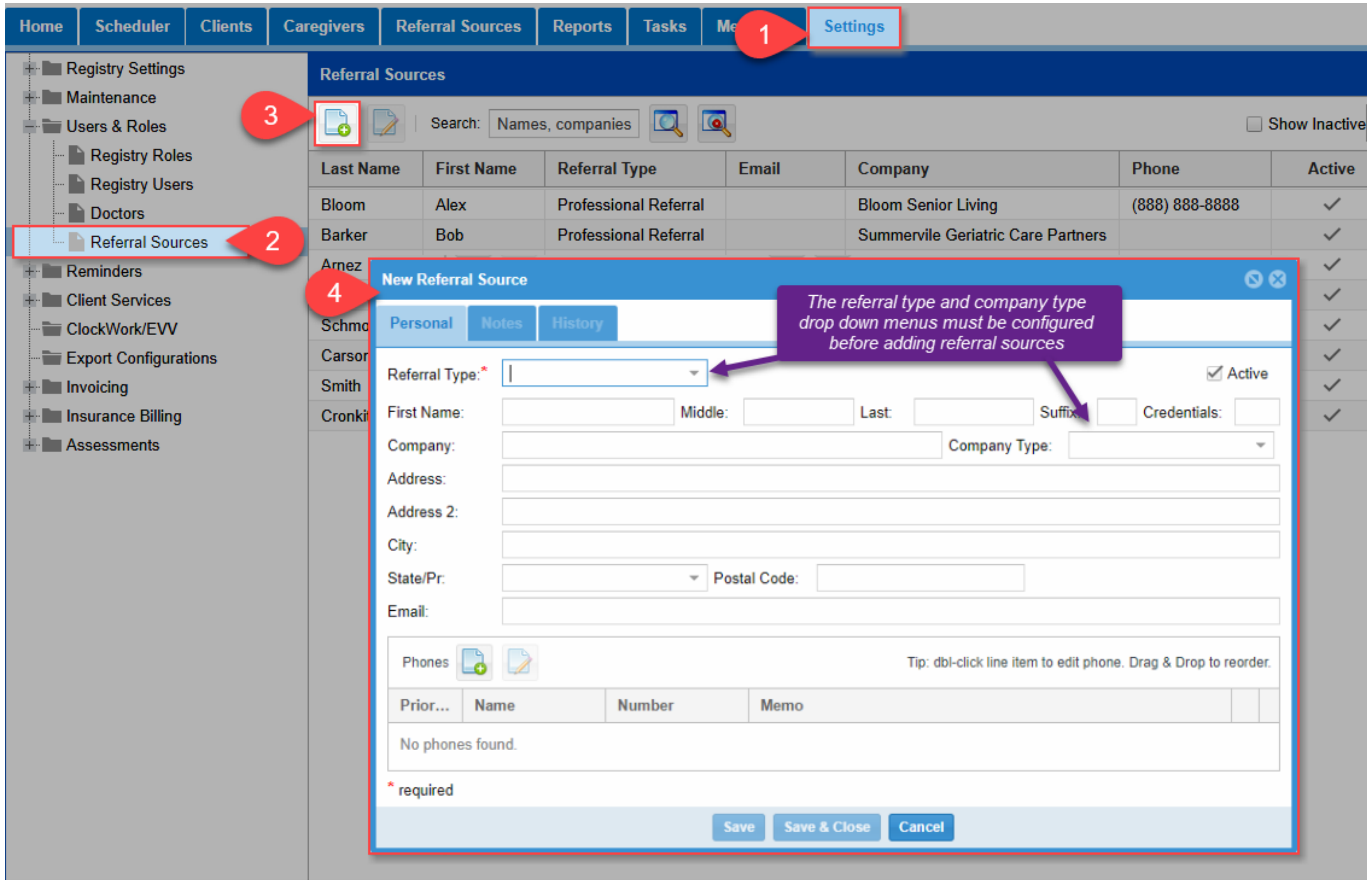
- Company Types can include hospitals, assisted living facilities, social media, or radio stations.



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.

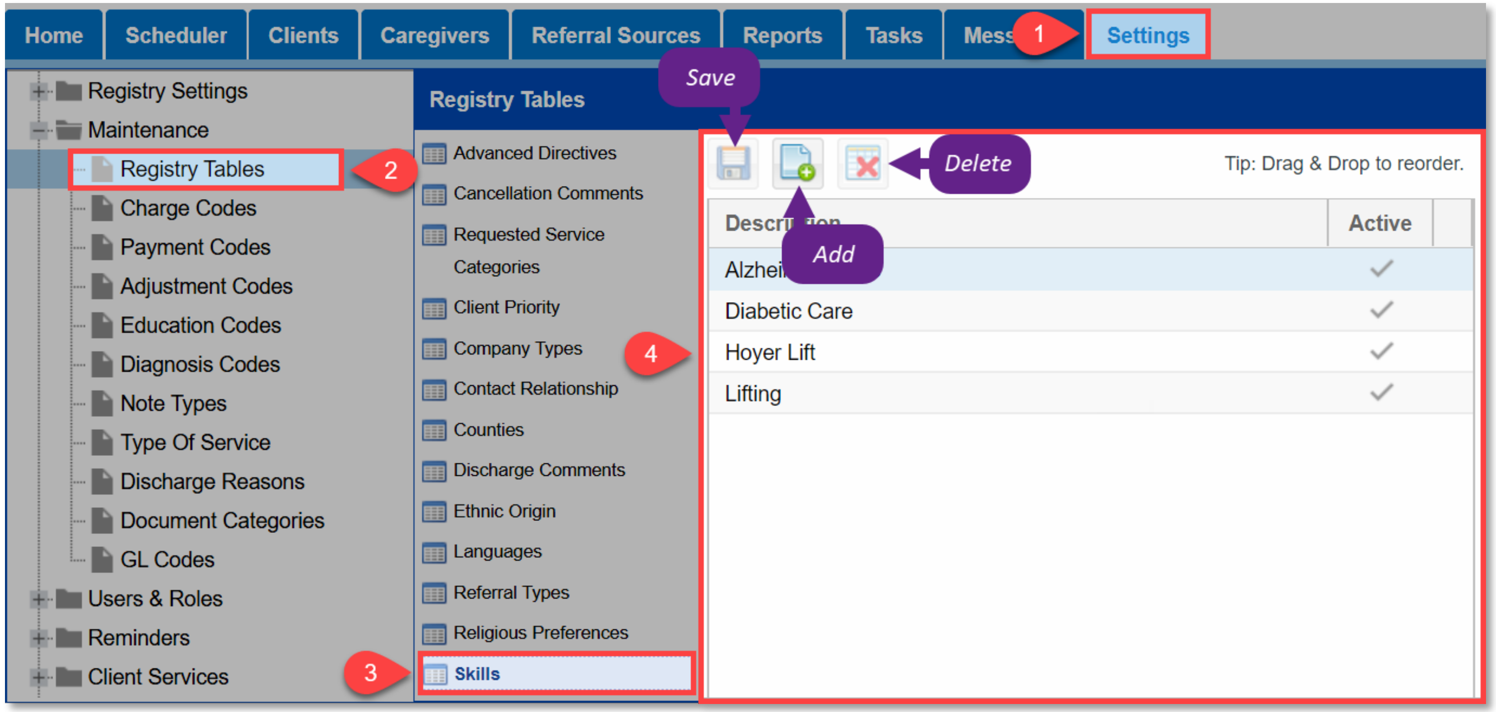
Menu Dropdowns

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.



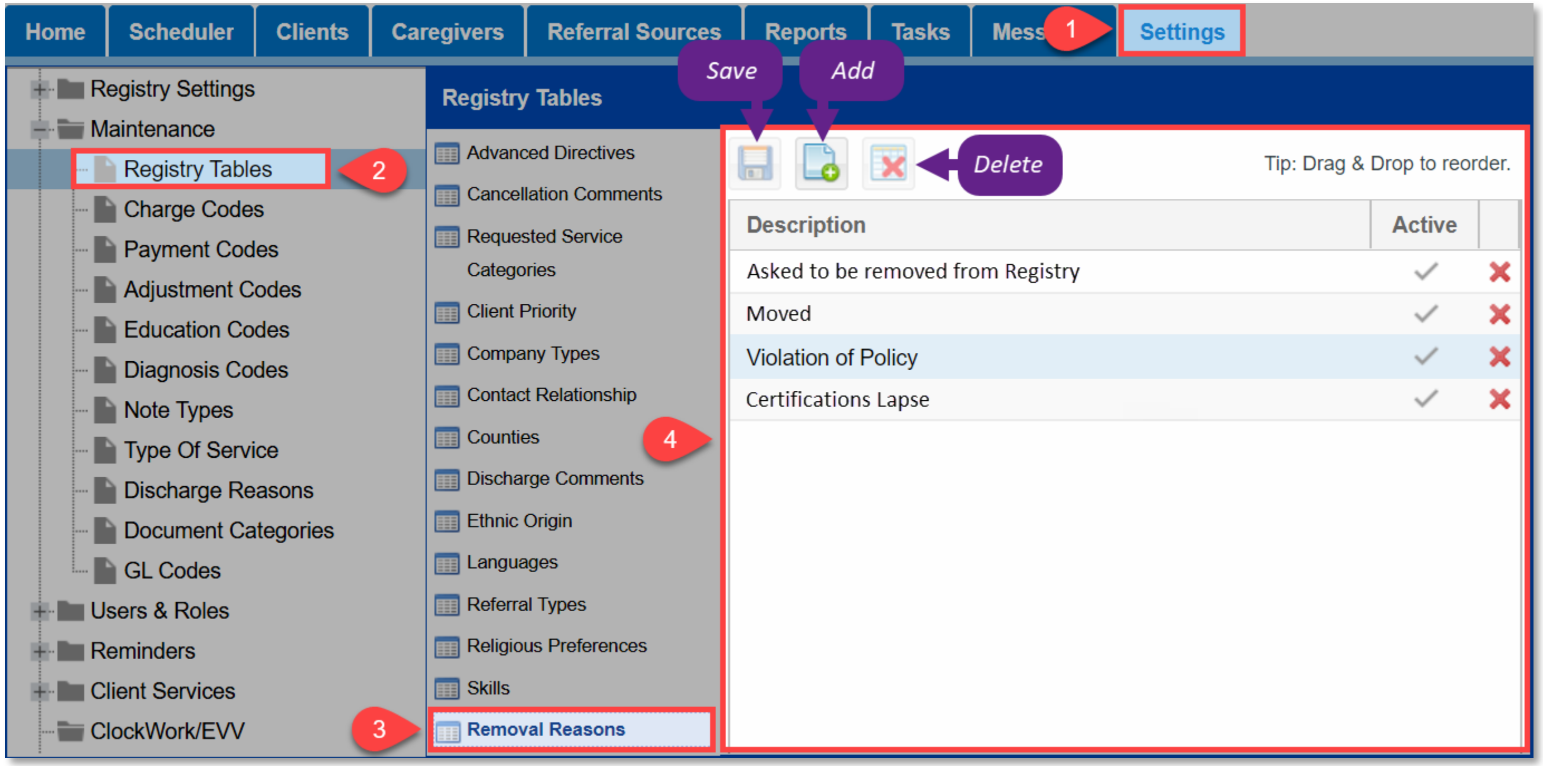
Menu Dropdowns

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…

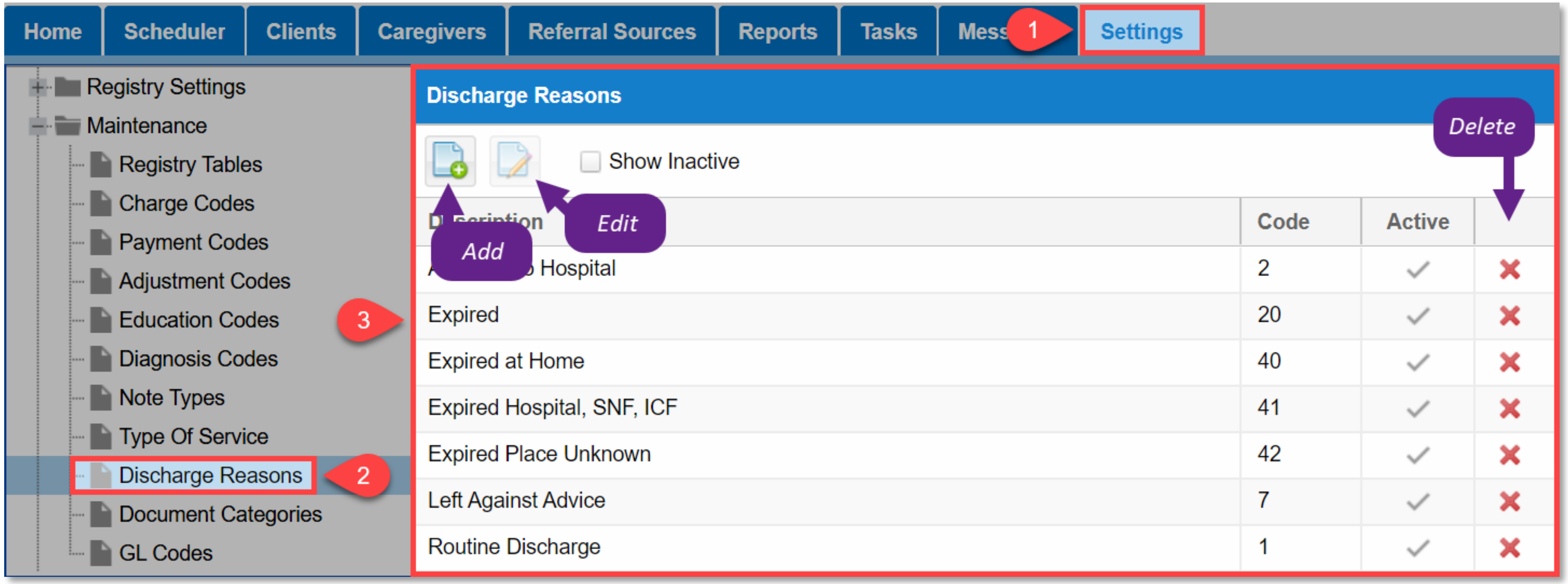
- Some examples of removal reasons include:
  - Asked to be removed from Registry
  - Moved
  - Certifications Lapse



Menu Dropdowns

Discharge Reasons

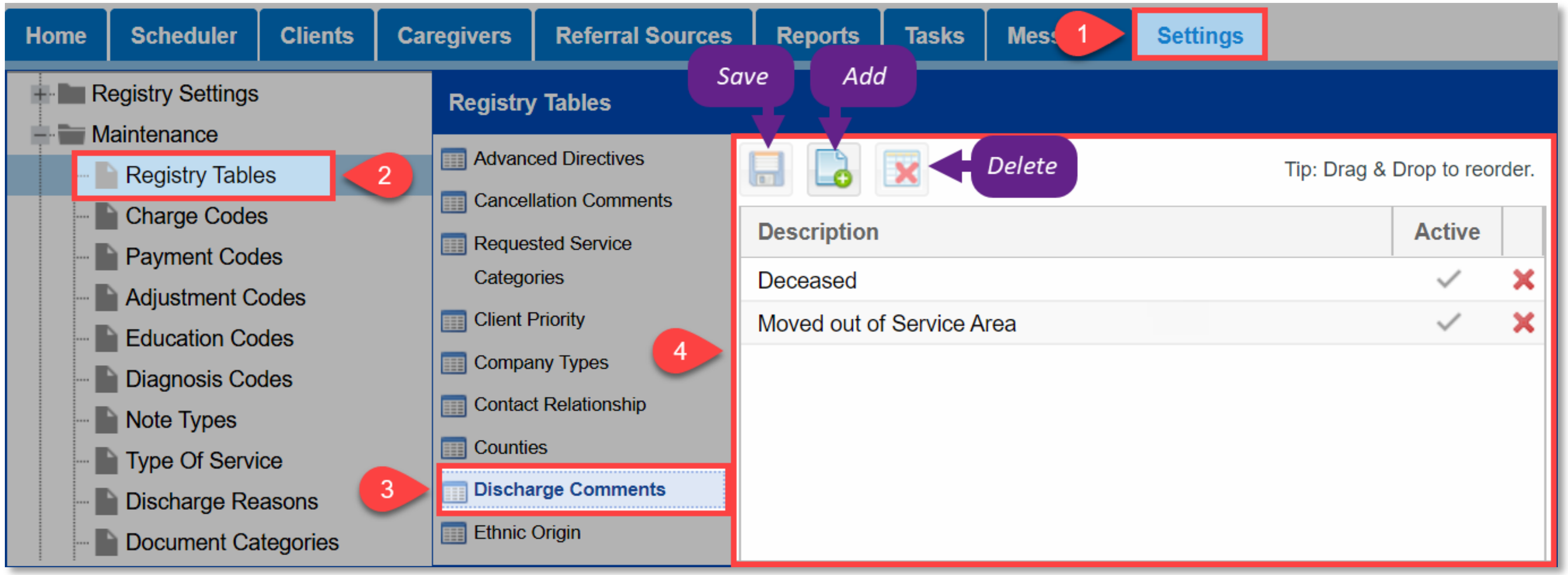
The Discharge Reasons table contains approved discharge reasons that are used when a Client is *ending* service. Reasons can be added, edited, or deleted here.



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.

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

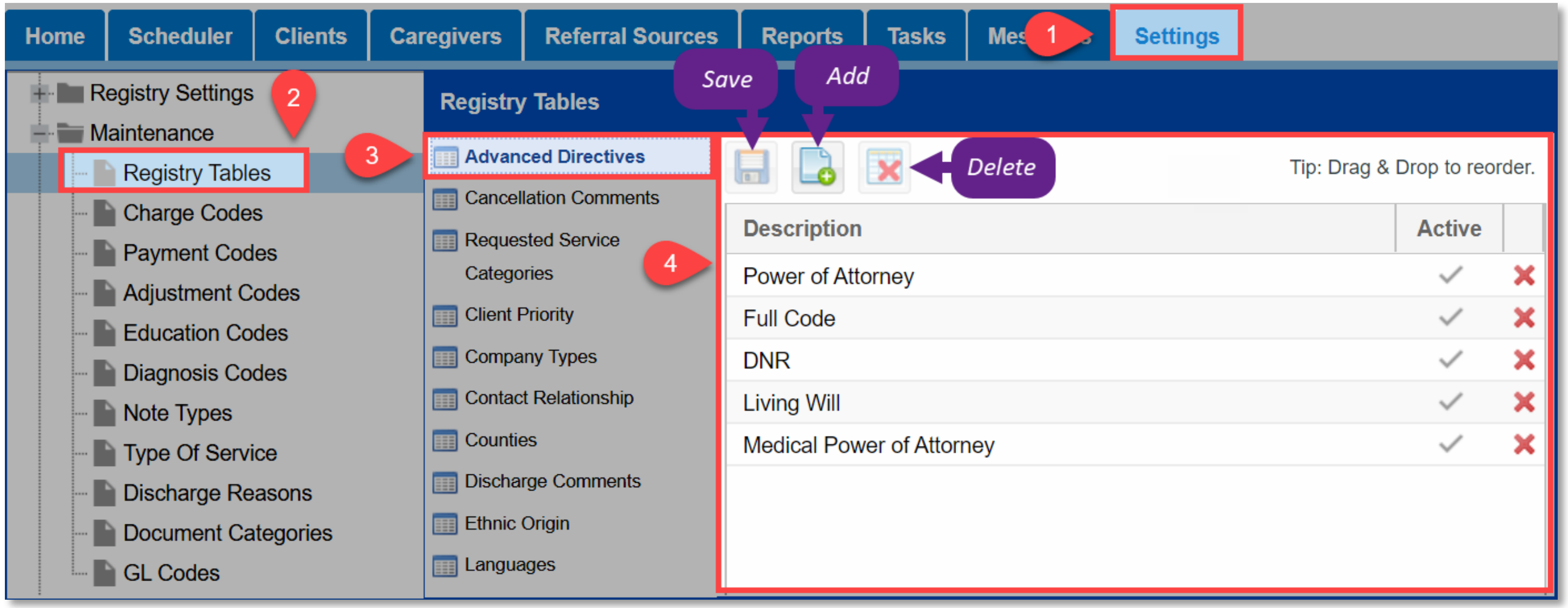
Menu Dropdowns (Optional)

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



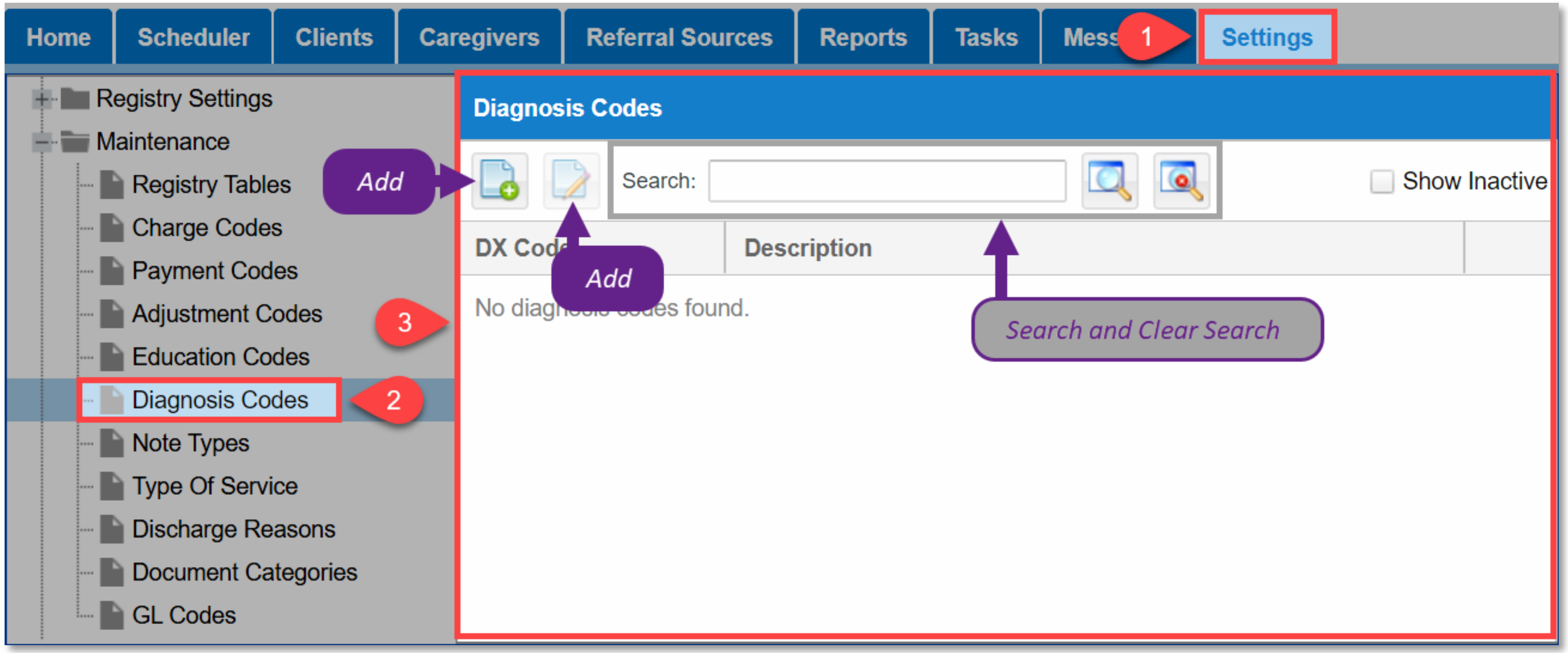
Menu Dropdowns (Optional)

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.



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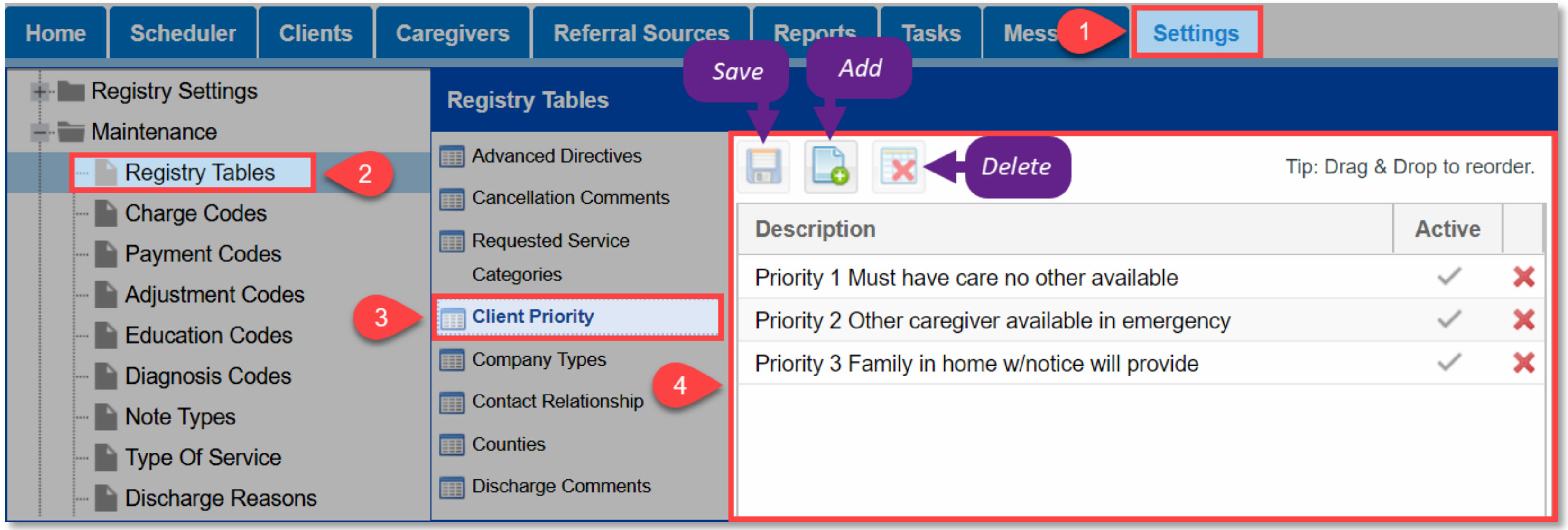
Menu Dropdowns (Optional)

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

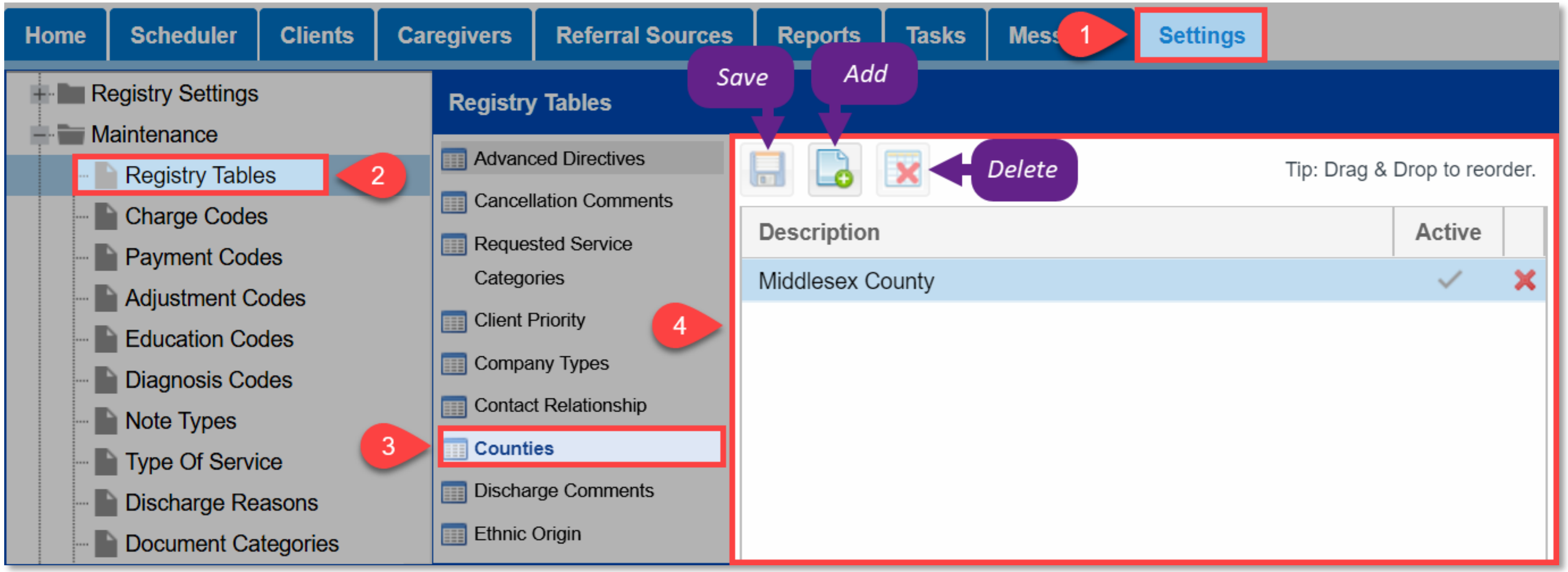
- If a Registry had a Caregiver shortage due to a natural disaster, this would inform them which clients cannot go without help.



Menu Dropdowns (Optional)

Registry Tables: Counties

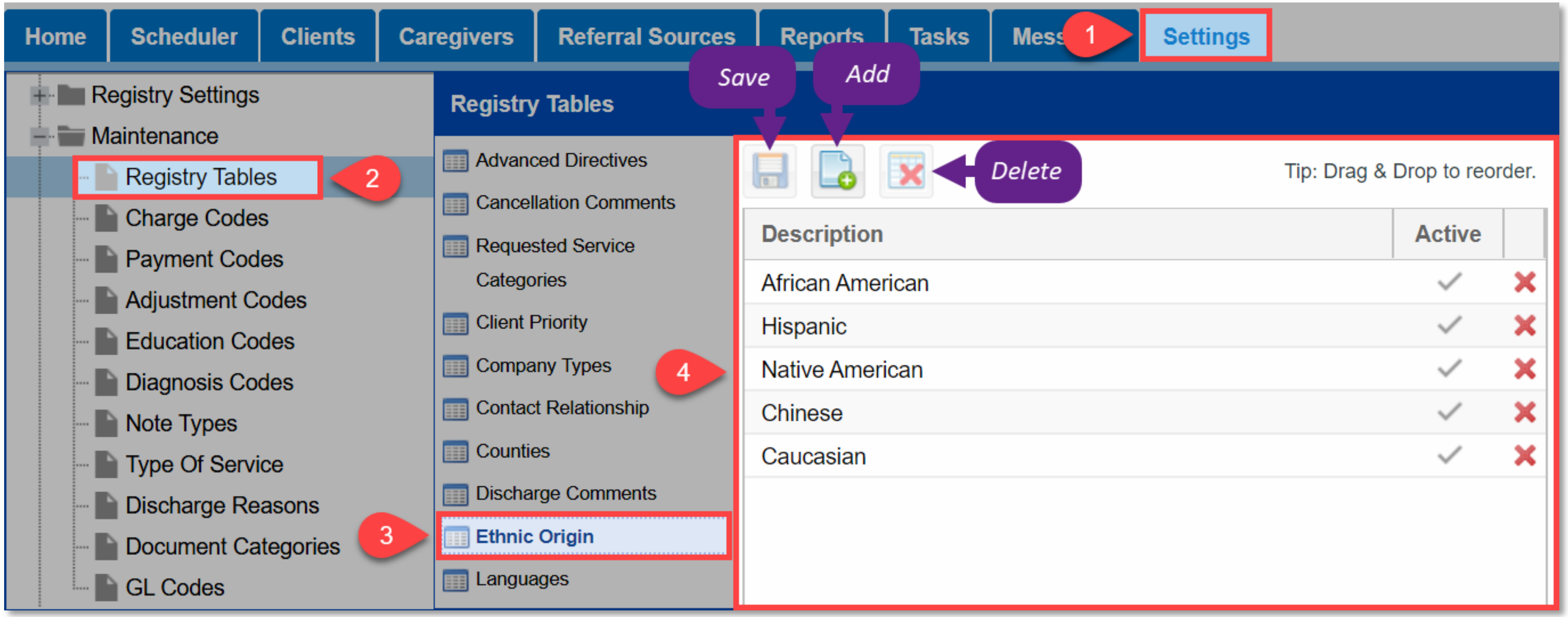
The Counties table allows you to set options available to use under a Client's "Personal Tab" when setting up or editing their information.



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.



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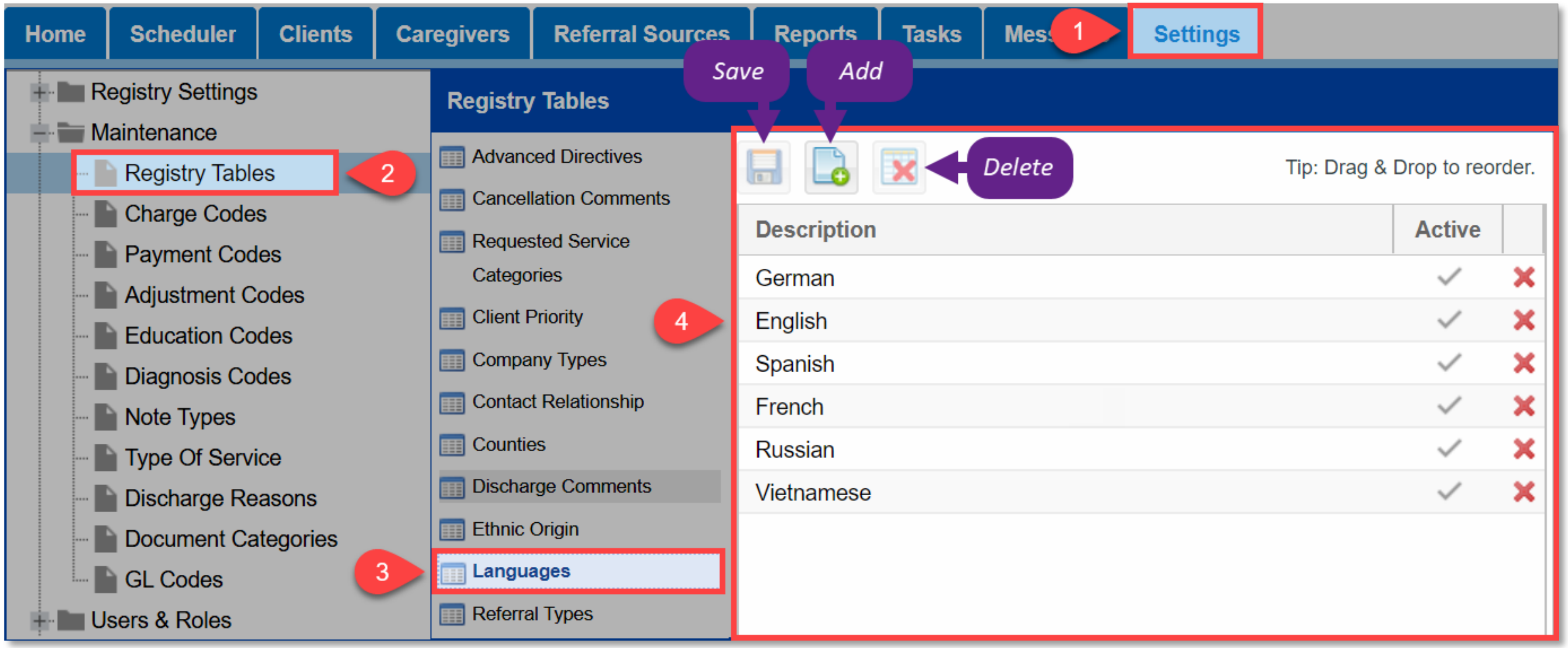
Menu Dropdowns (Optional)

Registry Tables: Languages

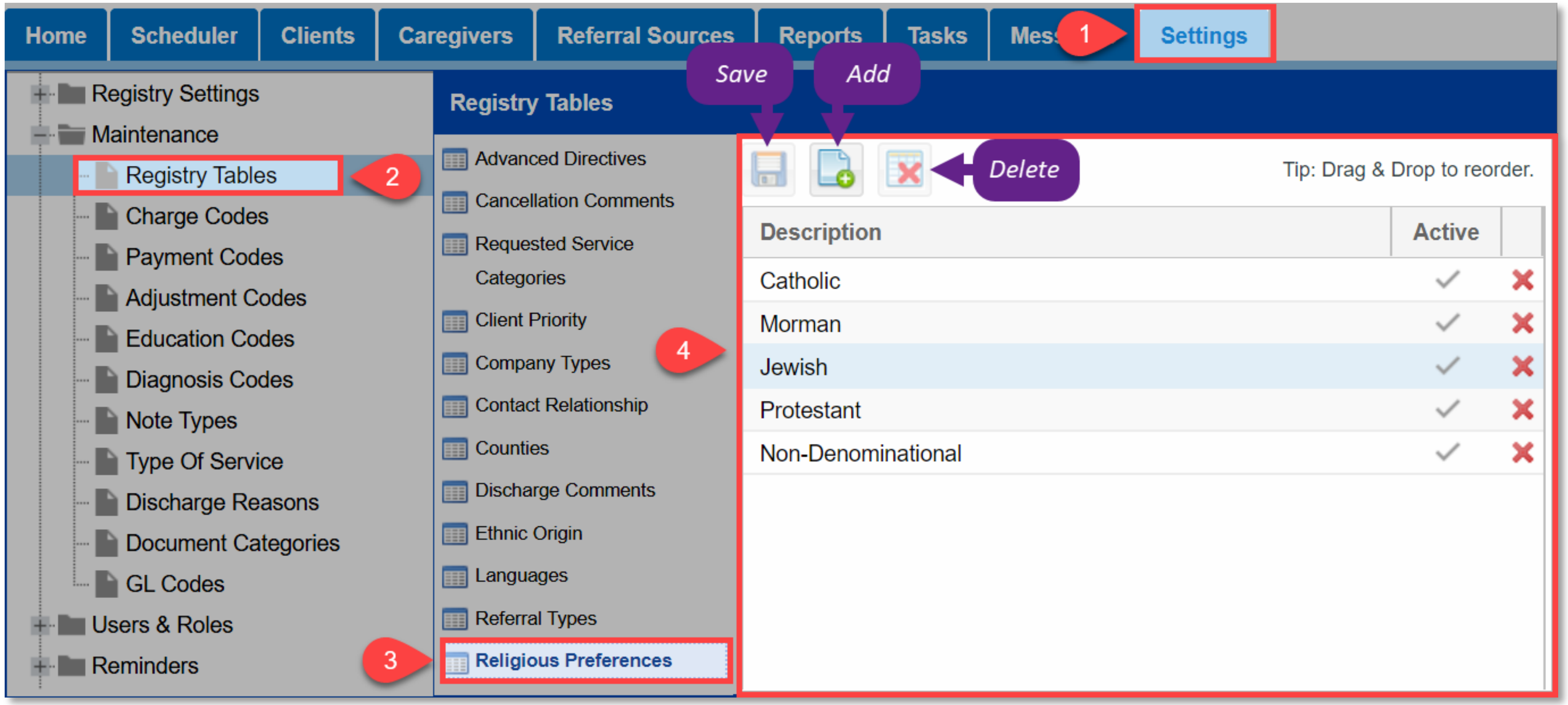
Use the Languages tab to curate a list of available languages to add to a Client or Caregiver's record.



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.



AssuriCare

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

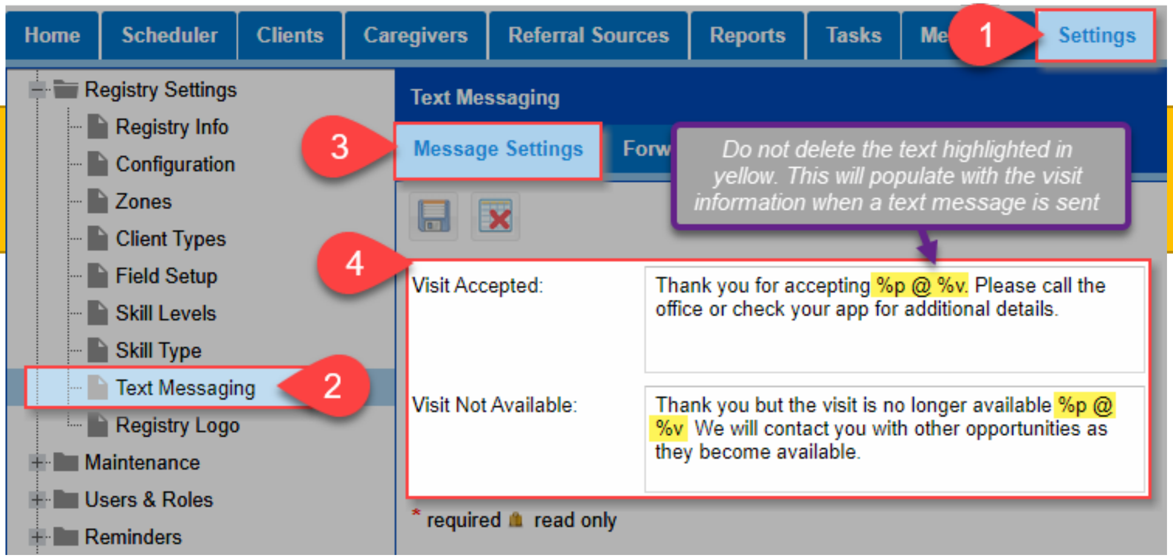
Communication Setup

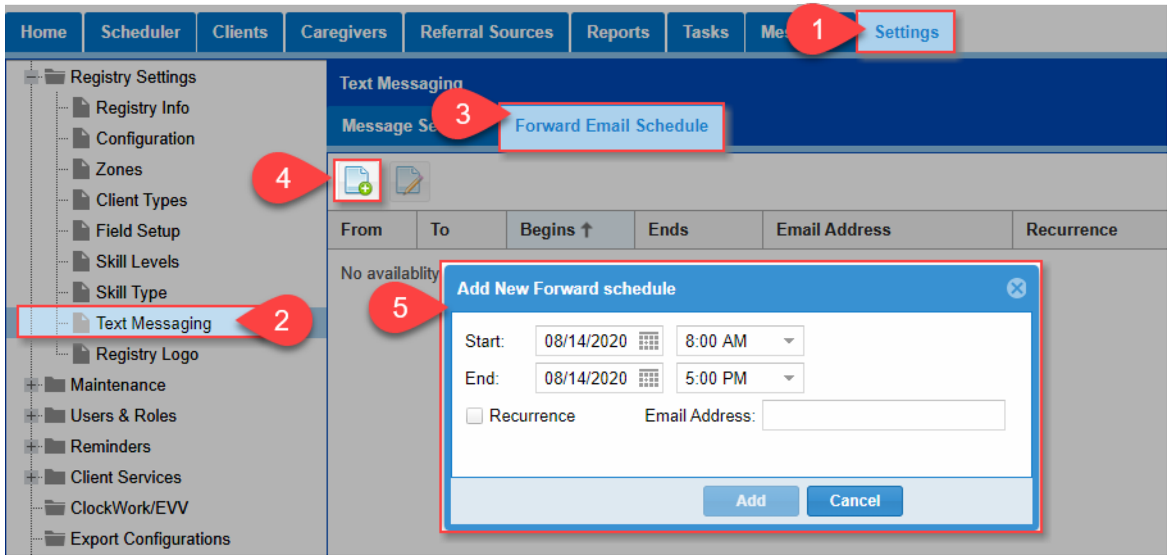
Text Messaging

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.





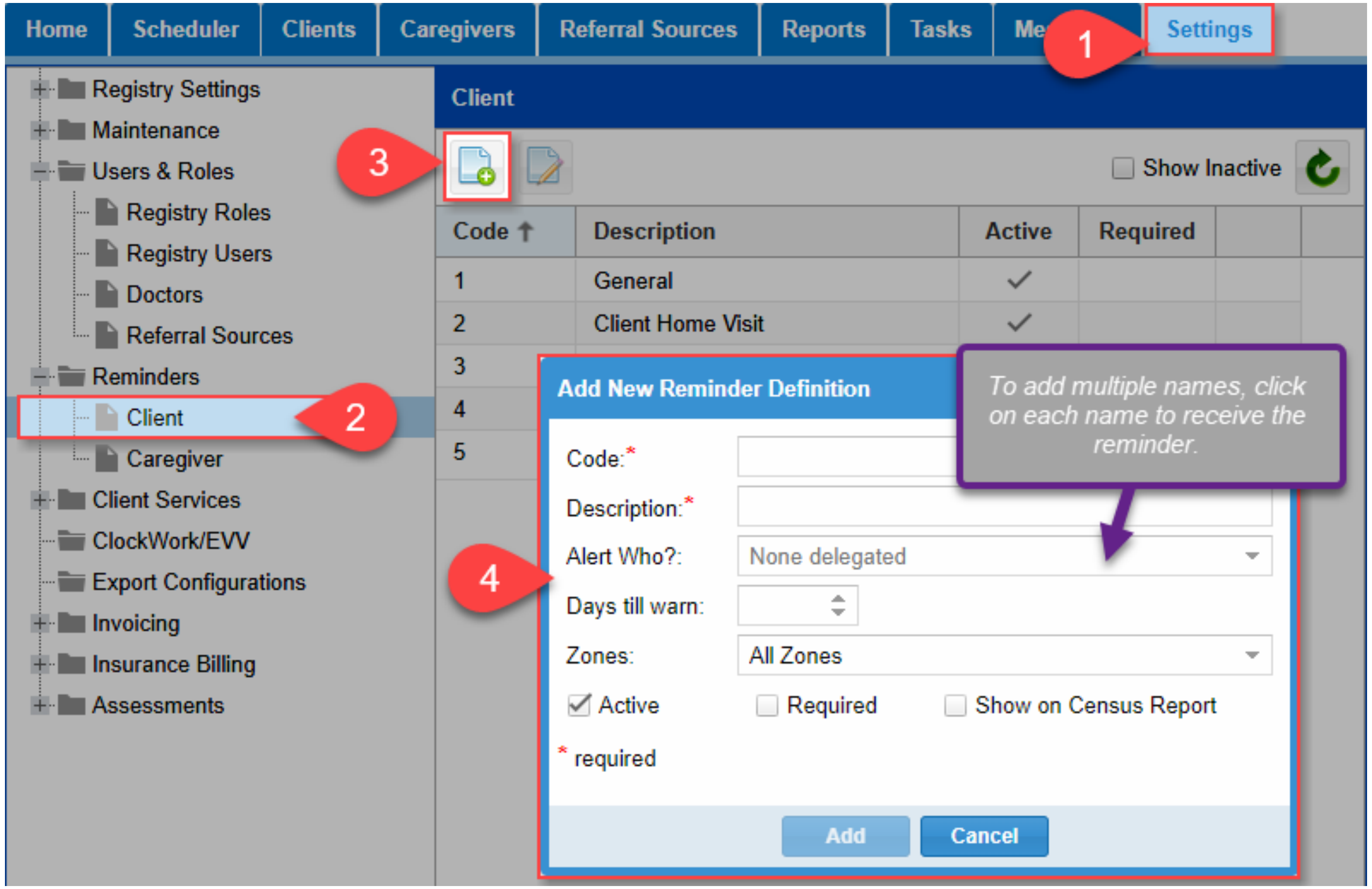
Communication Setup

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

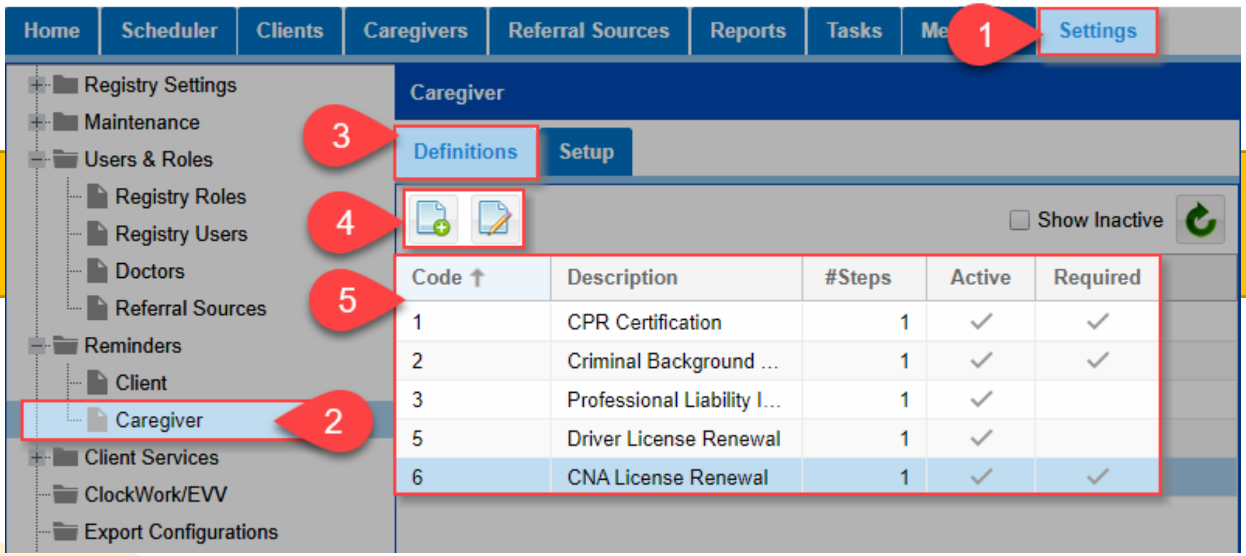
- Reminders are added on the Reminders tab of the Client record
- Required reminders will be flagged as missing if the caregiver record does not have one entered
- Reminders are **only** viewable to users who are added to the "Alert Who?" field



Communication Setup

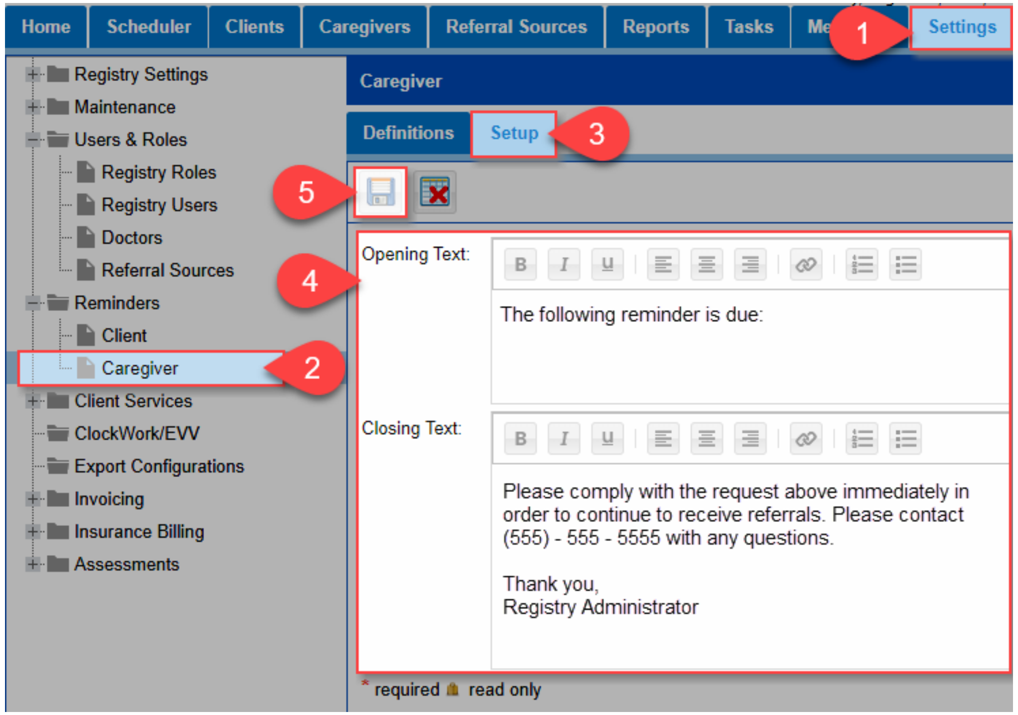
Caregiver Reminders

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.



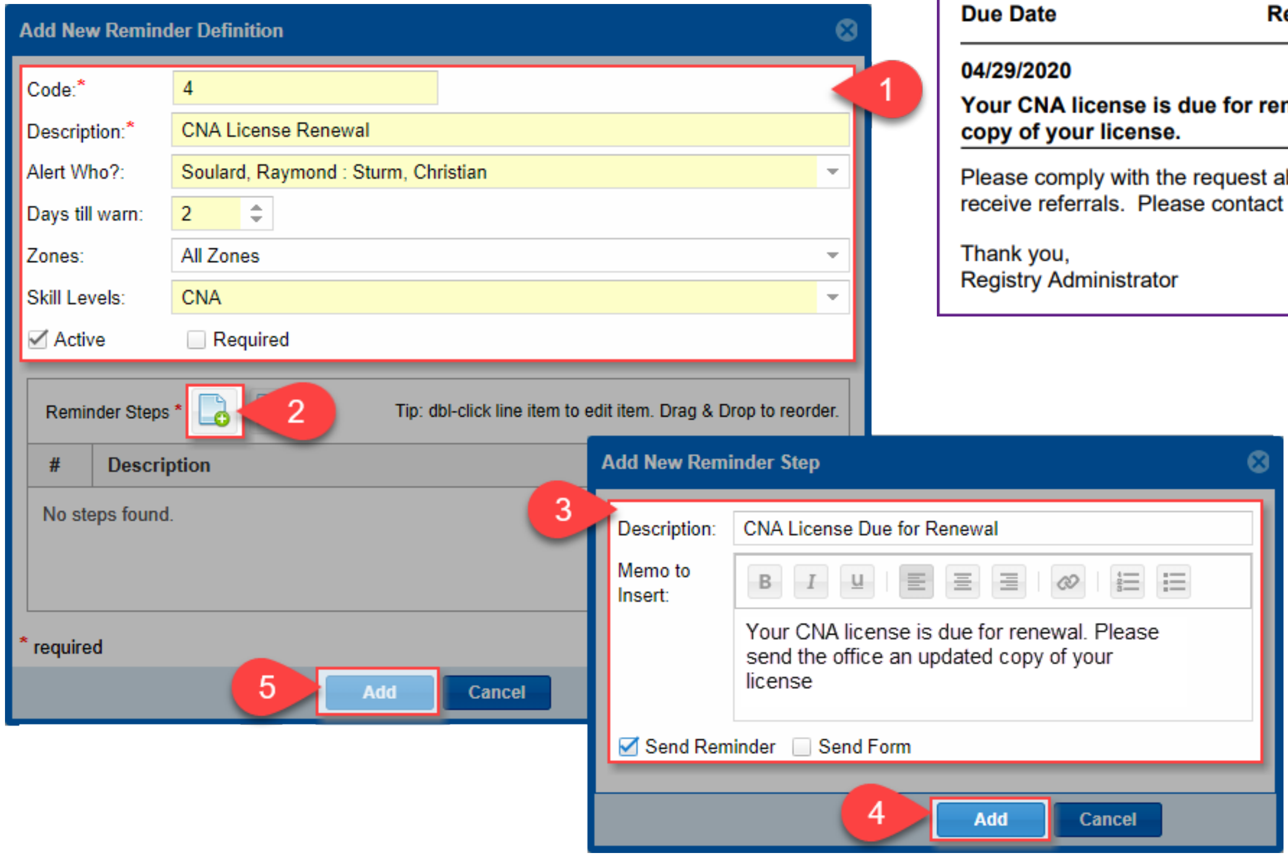
Communication Setup

Creating a Caregiver Reminder

Creating a caregiver reminder includes adding any necessary steps.

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.



Sample reminder

Dear Lauren,

The following reminder is due:

Due Date	**Reminder**
04/29/2020	

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

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

Thank you,
Registry Administrator

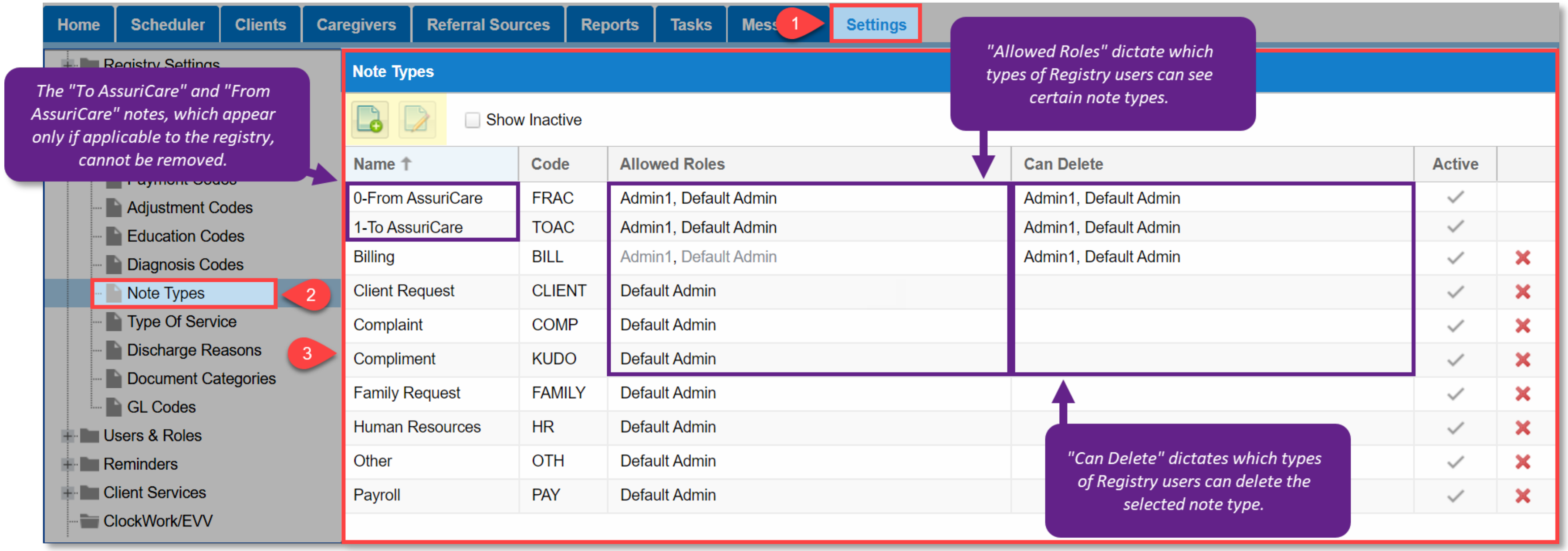
Communication Setup

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



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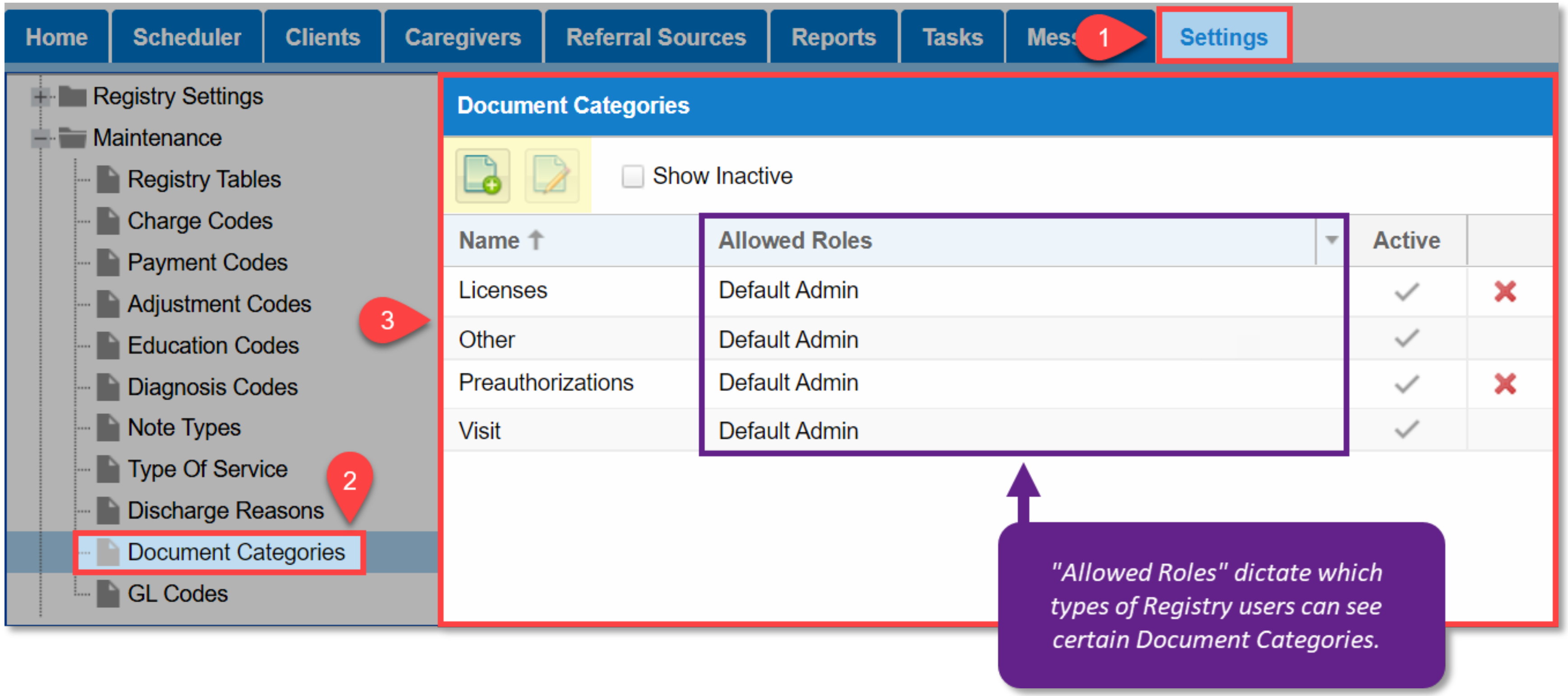
Communication Setup

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.



User Management

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

Configure user roles and permissions

Add new users

Manage users

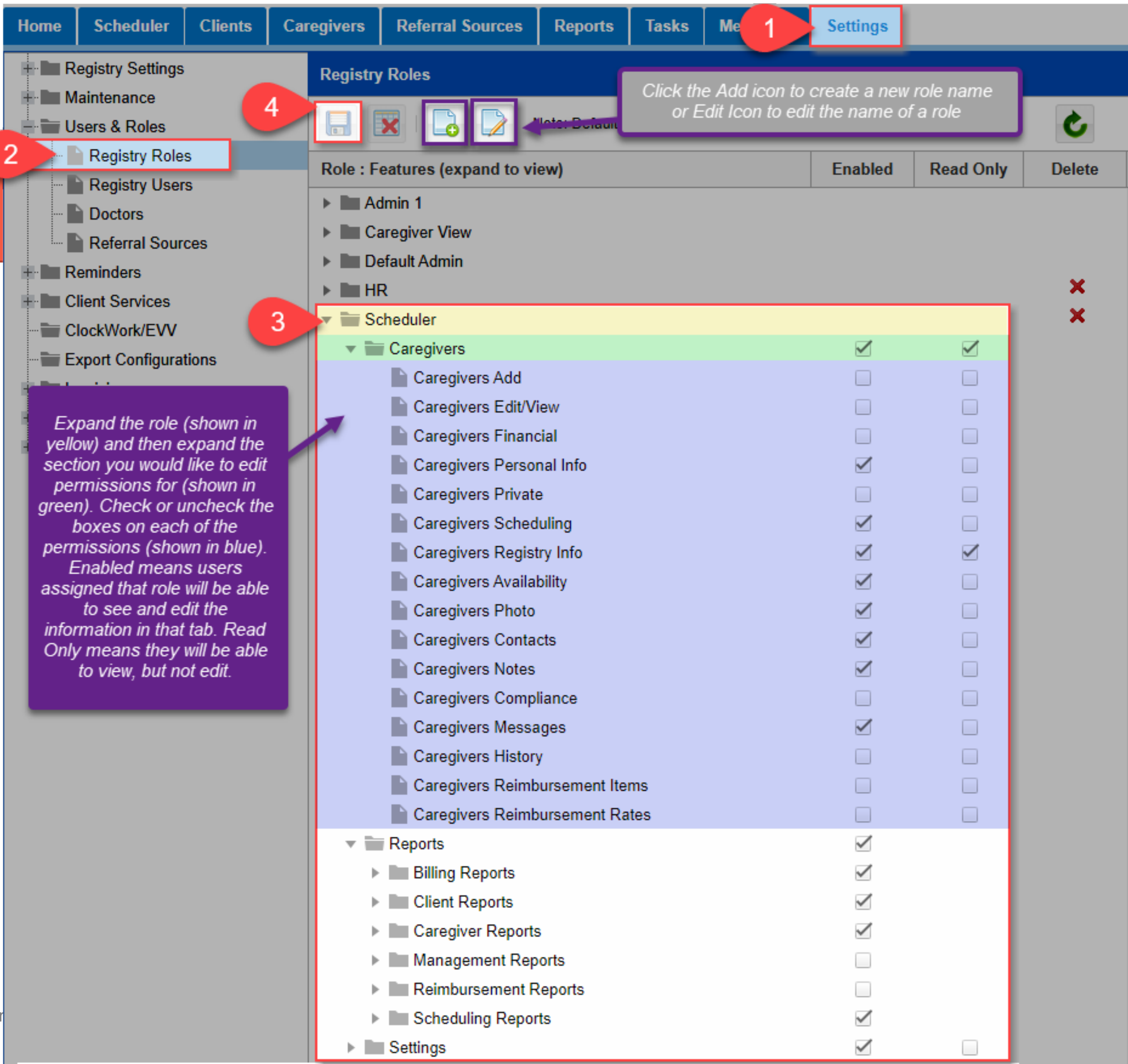
User Management

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.

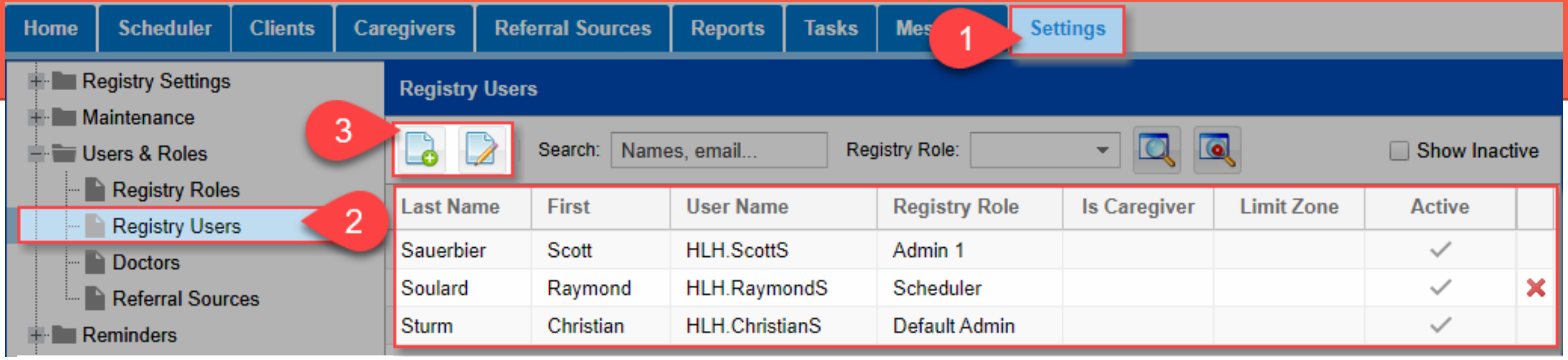
Configuration Notes

- 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.



User Management

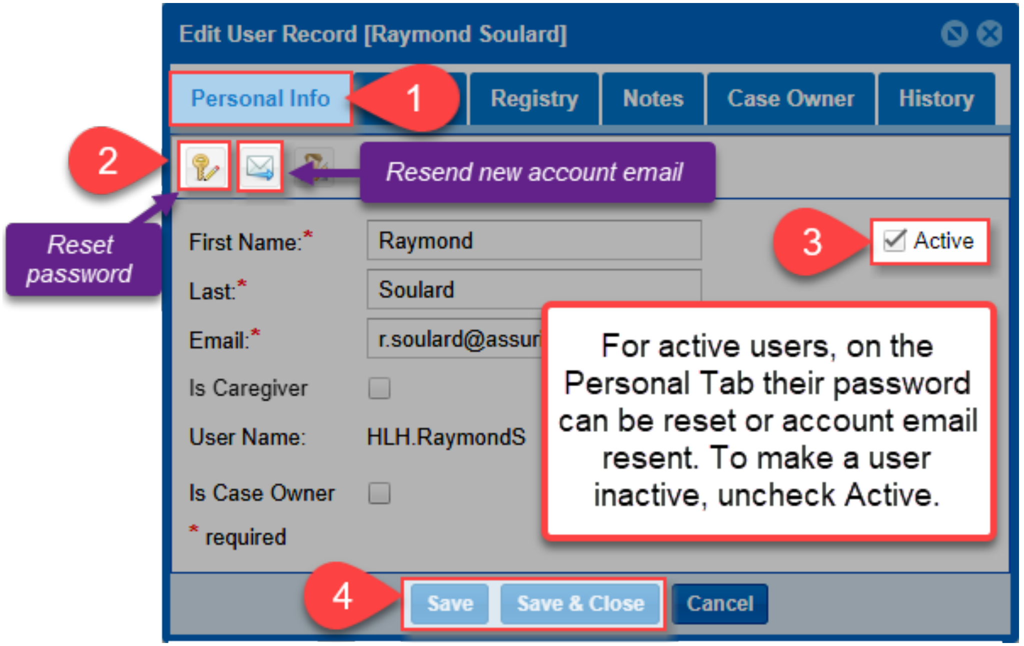
Registry Users



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

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.



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.