



RegistryConnect Training

Adding & Inactivating Caregivers

Adding a Caregiver – Getting Started



Adding a Caregiver in RegistryConnect can be accomplished in a few simple steps. Start by selecting the Caregivers tab. Once selected, click on the Add button.

The screenshot shows the RegistryConnect web application interface. At the top, there is a navigation bar with tabs: Home, Scheduler, Clients, Caregivers (highlighted with a red box and a red circle containing the number 1), Referral Sources, Reports, Tasks, Messages, and Settings. Below the navigation bar, there is a sub-navigation bar with tabs: Caregiver (highlighted with a red box and a red circle containing the number 2) and Prospect. The main content area displays a search and filter section with fields for Search (Names, cities, phor), Zone, and Skill Level. Below this is a table with columns: Last Name ↑, First ↑, Skill Level, City, State, Phone, Z..., Email, Add Date, Active, and Last Completed Visit. The table contains one row of data. At the bottom, there is a pagination section showing Page 1 of 1, Page Size: 25, and a status indicator: Displaying 1 - 1 of 1.



To learn how to set up the dropdown options for caregiver tab fields, see the RegistryConnect Configuration training

AssuriCare Proprietary and Confidential

Adding a Caregiver – Personal Information



Start with the Personal tab. Here you enter general information for the Caregiver. Items that are required for this step are marked with red stars. To add phone numbers to a Caregiver, select the Plus button, input their complete phone information and click Add.

The screenshot displays the 'Create Caregiver' interface. The 'Personal' tab is selected. The form includes fields for Caregiver ID, First Name, Middle, Last, Suffix, Credentials, Address, Address 2, City, State/Pr, Postal Code, Primary Email, and Secondary. A callout box explains the Address Validation button, which turns green when the address is correct. A red star is visible on the Postal Code field. An 'Add New Phone' dialog box is open, showing a phone number (111) 222-3333, a dropdown for 'Mobile/Text', and a dropdown for 'Cell Phone Carrier'. The dialog has 'Add' and 'Cancel' buttons. A tip at the bottom right of the dialog reads: 'Tip: dbl-click line item to edit phone. Drag & Drop to reorder.'

Click the Address Validation button to verify your entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.

Note that to use the Find Available feature (see Creating & Managing Visits) the caregiver's cell phone carrier must be entered.

Adding a Caregiver – Private Information



The second tab is the Private tab. Here, input all required information, as well as any available optional information.

- The social security number will be used if the client elects to have AssuriCare generate year end tax documents.
- The skill level that the caregiver is assigned will determine what type of visits they can be assigned. See the *RegistryConnect Foundations* training for more information on skill levels.

Create Caregiver

Personal **Private** Scheduling Registry

Add Date:* 04/13/2020

Birth Date: Age:

Gender:* Male Female Not Specified

Social Security:* 555-55-5555

OR

EIN:*

Skill Level:* HMK

Marital Status: Single Married

Payroll Number:

Removal Date:

Removal Reason:

Ethnic Origin:

Can Drive:

* required read only

Optional Fields - Editable at a later time

Adding a Caregiver – Scheduling Information



From the Scheduling tab, you must select the Caregiver's service Zone(s). Caregivers can be assigned to multiple zones. You may then enter in any available optional information.

- Caregivers can be assigned multiple zones. Clients and caregivers in different zones will create a scheduling conflict.
- The skills on the Scheduling tab will be used to match the caregiver up with the Client's Needs. If the caregiver does not have a particular client need, a warning will generate when assigning the visit (if enabled).

Create Caregiver

Personal Private **Scheduling** Registry

Zone:* East

Desired Hours Per Week: 40

Skills: Alzheimers Care Diabetic Care Hoyer Lift
 Lifting

Gender Preference: Female Male No Preference

Familiar Clients: **Familiar Clients** ↑
Client, Training

Acceptable message types: Email Text*

Scheduling Comment:

Enable Upcoming Alerts:

* required read only

Optional Fields - Editable at a later time

Adding a Caregiver – Registry Information



Finally, the Registry tab will be presented as the last tab to edit. Registry Role is required and should be left on the default Caregiver Limited View. Click Save and Close to complete adding the caregiver.



- Registry Role must be selected as Caregiver Limited View.
- Flexible scheduling allows for the caregiver to check in and out for a client without a scheduled visit. This is a Registry Connect default setting and should be checked.

The screenshot shows the 'Create Caregiver' form with the 'Registry' tab selected. The 'Registry Role' dropdown is set to 'Caregiver Limited View'. The 'Allow Flexible Scheduling' checkbox is checked. A callout box contains the text: 'Select "Caregiver Limited View" for Registry Role and check "Allow Flexible Scheduling" - These are Registry Connect default settings'. The 'Save & Close' button is highlighted.

Inactivating a Caregiver



Inactivating a Caregiver in RegistryConnect is straightforward as well. Simply click into the caregiver and then select the removal date and reason on the Private tab.

Once inactivated:

- Any future visits that were assigned to the caregiver will show as unassigned
- The caregiver will not be able to check in or out using the mobile app
- When looking at caregiver reports, you can elect to include inactive caregivers or exclude them

1

2

3

Select the removal date and reason. Once saved, the caregiver will be marked inactive

Save Save & Close Cancel

Creating Caregiver Prospects



RegistryConnect gives you the ability to enter and track prospective caregivers. To add a prospective caregiver, click on the Add Icon under the Prospects tab.

With caregiver prospects you can track:

- Contact information
- Referral sources
- Prospective caregiver skills
- Additional demographic and scheduling information

Create Caregiver Prospect

Personal Private Scheduling Registry

Caregiver ID: [Auto]

First Name: * [] Middle: [] Last: [] Suffix: [] Credentials: []

Address: []

Address 2: []

City: [] State/Pr: [] Postal Code: []

Primary Email: [] Secondary: []

Phones [] [] Tip: dbl-click line item to

Prior...	Name	Number	Memo
No phones found.			

Referral Source: [] Referral Date: []

Initial Contact: [] Contact Date: []

Interview Conducted By: [] Conducted Date: []

* required 🛡 read only

Save Save & Close Cancel

To add a caregiver prospect, click on the Add icon under the Prospect tab. Complete the information and save the prospect.

Converting Caregiver Prospects to Active



When you are ready to convert a caregiver prospect to active, simply open the Prospective Caregiver record and click Convert to Active.

- When you convert the caregiver, RegistryConnect will prompt you to enter any required information before allowing conversion. For example:
 - Full Address
 - Email
 - Skill Level
 - Social Security Number / EIN
- Once converted you will be able to assign the caregiver to visits

1. Caregivers menu

2. Prospect tab

3. Birch record

4. Edit icon

5. Close button

6. Convert to Active button

To convert to an active caregiver, open the Prospective Caregiver record and click Convert to Active. You will be prompted to enter any missing required information before you can convert.



RegistryConnect Training

Editing Caregivers

Editing a Caregiver – The Basics



The slides in this presentation will show the editable fields found on each tab, and spotlight user's most common editing actions. At any point in the management process, you may click the “Close”, “Save”, or “Save and Close” buttons at the bottom of the screen.

To learn how to set up the dropdown options for caregiver tab fields, see the RegistryConnect Configuration training.

Editing a Caregiver – The Basics

Once a Caregiver has been added to RegistryConnect, there are many options available to help you edit their information and manage their account. The basics of the editing functionalities fall into four categories:



Edit Information

- Update personal and private info
- Manage contacts



Scheduling

- Add Caregiver Skills and Familiar Clients
- Set Unavailability



Billing

- Manage employment / payment info



Records

- Set reminders
- Add notes
- Manage time sheets
- View Caregiver record history

Editing a Caregiver – Getting Started

To access the editing options for a Caregiver within RegistryConnect, navigate to the Caregivers tab, select the Caregiver you'd like to manage, and then click the edit icon. Additionally, the Caregiver's name may be double clicked to begin editing.

RegistryConnect

Notices (0) Welcome tra.raymonds@ Training Registry! Wednesday, April 22, 2020, 2:48:05 PM

Home Scheduler Clients **Caregivers** Referral Sources Reports Tasks Messages Settings

Caregiver Prospect

Search: Names, cities, phor Zone: Skill Level: Show Inactive

Last Name ↑	First ↑	Skill Level	City	State	Phone	Z...	Email	Add Date	Active	Last Completed Visit		
Test	John	HMK	Trenton	NJ	(555) 555-5555	E...	livingonapr...	4/13/2020	✓		✗	
Test	Ray	CNA	Shrewsb...	MA	(555) 555-5555	E...	training@a...	4/6/2020	✓	04/09/2020 11:10 AM		

Page 1 of 1 Page Size: 25 Displaying 1 - 2 of 2

Editing a Caregiver – Editing Information



Personal Information Tab

Use the Personal tab to edit a Caregivers identifying information, as well as their address and contact information.

Common Actions:

- Updating a Caregiver's address after a move
- Adding, removing, or updating a Caregiver's phone information
- Correct spelling issues

Click the Address Validation button to verify your entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.



Personal

Caregiver ID: 4 [Auto]

First Name*: Davey Middle: Last: Jones Suffix: Credentials:

Address: 1 Daydream Believer Way

Address 2:

City: Boston State/Pr: Massachusetts Postal Code: 02134

Primary Email: monkeemania@mail.com Secondary:

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

Prior...	Name	Number	Memo
1	Mobile/Text	(555) 555-5555	

Referral Source: Referral Date:

Initial Contact: Contact Date:

Interview Conducted By: Conducted Date:

* required read only

Editing a Caregiver – Editing Information



Private Information Tab

Use the Private tab to edit a Caregiver's secured information, such as SSN or EIN, birth date, and marital status.

Common Actions:

- Remove a Caregiver from the Registry with a date and reason. By entering a removal date and reason, the caregiver will be marked as inactive.
- Change the skill level of the caregiver

The screenshot displays the 'Private' tab in the RegistryConnect interface. The form includes the following fields and options:

- Add Date:*** 04/13/2020 (calendar icon)
- Birth Date:** [text input] **Age:** [text input]
- Gender:*** Male Female Not Specified
- Social Security:*** 555-55-5556
- OR**
- EIN:*** [text input]
- Skill Level:*** HMK (dropdown menu)
- Marital Status:** Single Married
- Payroll Number:** [text input]
- Removal Date:** [text input] (calendar icon)
- Removal Reason:** [dropdown menu]
- Ethnic Origin:** [dropdown menu]
- Can Drive:**

* required 📁 read only

Editing a Caregiver – Editing Information



Photo Tab

Use the Photo tab to upload a photo of the Caregiver to be used in RegistryConnect.

Common Actions:

- Update a Caregiver's photo by selecting a new version from your computer

Personal Photo Scheduling Registry Notifications Available **Photo** Contacts Notes Financial Compliance Usage History

Photo File: **Select photo** ¹

Upload ² **Reset**

Clicking "Select Photo" will open a navigation window that will allow you to select a photo from your computer.

Editing a Caregiver – Editing Information



Contacts Tab

The Contact tab allows you to add, delete, or edit points of contact for the Caregiver, such as a doctor or family member.

Common Actions:

- Add backup contacts for a Caregiver to ensure that there is a way to contact them in case of emergencies.

Last Name	First Name	Company	Contact Type	Address	Phones/Email Address	Comment
[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]
[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]
[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]	[Blurred]

Editing a Caregiver – Scheduling



Scheduling Tab

Use the Scheduling tab to edit information pertaining to a Caregiver's scheduling options.

Common Actions:

- Add Familiar Clients to the Caregiver's record
- Edit the caregiver's assigned zones
- Edit the Caregiver's Skills designations. These will be used to match up with Client needs (if enabled)
- Enable text messages
- Update a Caregivers desired hours

Zone:* East

Desired Hours Per Week: 41

Skills: Alzheimers Care Diabetic Care Hoyer Lift
 Lifting

Gender Preference: Female Male No Preference

Familiar Clients:

Familiar Clients ↑	
Client, Training	✖
1 items	

Acceptable message types: Email Text*

Scheduling Comment:

Enable Upcoming Alerts:

* required 🔒 read only

Editing a Caregiver – Scheduling



Unavailable Tab

Use the Unavailable tab to designate times that a Caregiver is unable to provide care for Clients.

Common Actions:

- Add or modifying recurring unavailable date for Caregivers
- View a Caregivers monthly schedule

Tip: Add/edit time blocks where this person is **not** available. Display All

Available ↑	From	To	Begins ↑	Ends	Comment	Recurrence	
No	8:00 AM	5:00 PM	04/13/2020	No end date		Every day Effective 4/13/2020 from 8:00 AM to 5:00 PM	✖

Scheduled Visits : April 2020

Mar 29, 2020	Mon 30	Tue 31	Apr 1	Thu 2	Fri 3	Sat 4
5	6	7	8	9	10	11
12	Today 1:00 pm	14	15	16	17	18

Click on the Schedule icon to open the Caregiver's monthly schedule.

Editing a Caregiver – Billing



Financial Tab

Use the Financial tab to make changes to a Caregivers financial information; this information is sent to AssuriCare's payment processing service.

Common Actions:

- Upload the [Direct Deposit Authorization Form](#) and [W-9](#) – required for AssuriCare payment processing
- Edit Caregiver Direct Deposit information

Type	Information	Bank/Billing Name	Default
Bank Account	Checking account ending in 2334	Joe's Bank	✓

Add Financial Record

Type: Bank Account

Bank Name:

Account Type: Checking Savings

Account #: Routing #:

Confirm Account #: Confirm Routing #:

Document Upload

Direct Deposit:

W9:

To process payments the Direct Deposit and W9 are required

* required

Editing Financial Record - Checking account ending in 2334

Type: Bank Account

Bank Name:

Account Type: Checking Savings

Account # (Last 4): Routing #:

Confirm Account # (Last 4): Confirm Routing #:

* required

Editing a Caregiver – Records

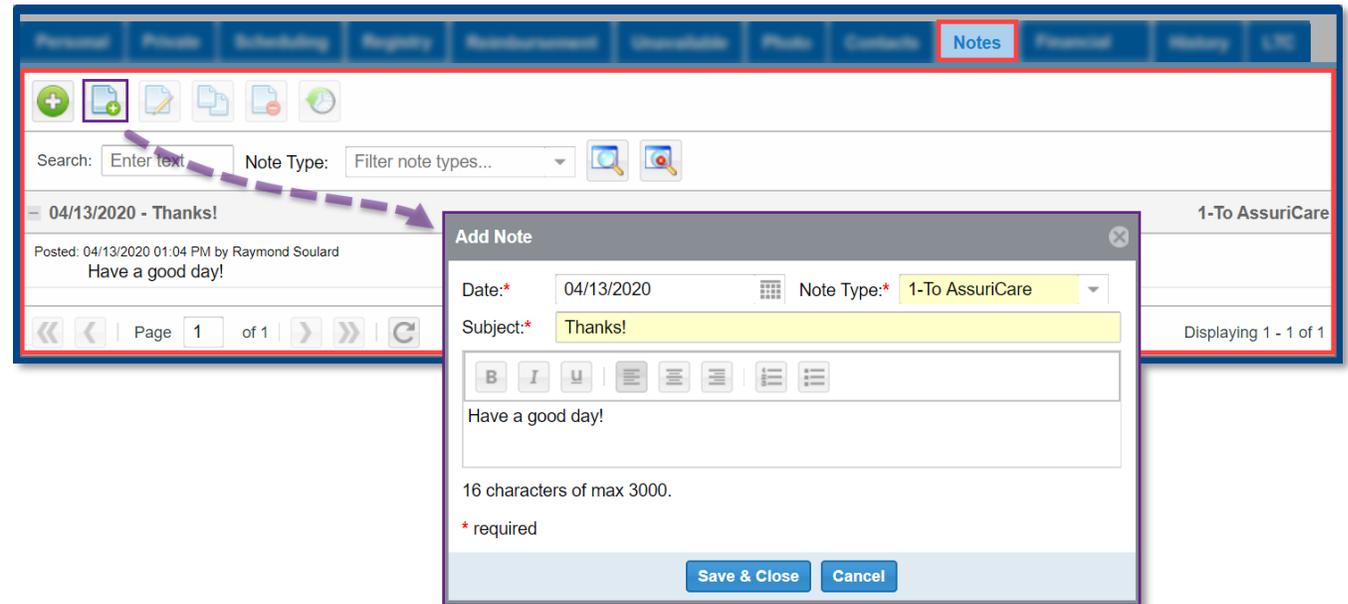


Notes Tab

Use the Notes tab to enter or edit notes pertaining to the Caregiver you'd like to manage. Existing notes can be copied over to other Caregiver records by using the dropdown list to select recipients. The “To AssuriCare” note type will send a note to the AssuriCare customer service team. See the *RegistryConnect Configuration* training for instructions on how to set up note types.

Common Actions:

- Add notes regarding rate changes, complaints, billing, or other specific communications relating to the Caregiver.
- To AssuriCare notes will be received by AssuriCare’s customer service team.



Editing a Caregiver – Records



Compliance Tab: Reminders

Use the Reminders tab to input and edit reminders pertaining to the Caregiver that you are managing. See the *RegistryConnect Configuration* training for instructions on how to set up reminder types.

Common Actions:

- Add reminders about licensure expirations

The screenshot displays the 'Reminders' tab in the RegistryConnect interface. The 'Add New Reminder' dialog box is open, showing the following fields:

- Reminder Code: [1] CPR Certification
- Status: 1 : CPR First Reminder
- Due Date: 04/25/2020
- Notify Method: Email
- Comment: (empty text box)

The dialog box also includes an asterisk (*) indicating required fields and buttons for 'Add' and 'Cancel'.

Editing a Caregiver – Records



Compliance Tab: Education

If your Registry tracks Caregiver educational information, use the Reminders: Education tab to document courses, certifications, and other trainings that the Caregiver has acquired / taken.

Common Actions:

- Update a Caregiver's account when they have completed HIPAA certification or CPR certification

The screenshot displays the 'Reminders: Education' tab in the RegistryConnect interface. The main area shows a table with columns: Type, Class Date ↓, Name, Hours, File Date, and Comment. The table is currently empty, displaying 'No education entries found'. An 'Add Education' modal window is open, allowing the user to enter the following information:

- Education Type: Online Course (dropdown menu)
- Class Name: CPR Training (text input)
- Class Date: 05/12/2020 (calendar picker)
- Hours: 1 (spinner)
- File Date: 05/18/2020 (calendar picker)
- Comment: (text input)

The modal includes 'Add' and 'Cancel' buttons at the bottom. A dashed arrow points from the 'Add' button in the modal to the table area.

Editing a Caregiver – Records



Message History Tab

The Message History tab keeps a record of “Find Availability” text messages that have been sent to Caregivers, as well as their replies. See the *Creating & Managing Visits* training for more information and instructions on how to find available caregivers using this functionality.

Date/Time	Sent To	Message
No message activity found.		

Page 0 of 0 | Page Size: 25 | Show: Last 7 days | No data to display

Editing a Caregiver – Records



Files Tab

From the Files tab, you can upload and store required files for a Caregiver's profile. File types are tied to User Roles, and designated file categories are created in the Registry Settings tab. See the *RegistryConnect Configuration* training for more instructions.

Note: AssuriCare recommends that Registries upload W-9's and Direct Deposit files on the Financial Tab.

Common Actions:

- Upload copies of certifications and caregiver rate agreements

The screenshot shows the Files tab interface. At the top right, the 'Files' tab is highlighted. Below the navigation bar, there are icons for file operations and a search bar. The main area contains a table with the following data:

File Name	Category	Description	Status	Created On	Uploaded ...	Downlo...	Actio...
EDI_592445019_20191226122846.csv	Other	Test Send	Completed	01/16/2020...	_Agency _...		

At the bottom, there are navigation controls including page numbers (Page 1 of 1), a refresh button, and a page size dropdown set to 25. The text 'Displaying 1 - 1 of 1' is shown at the bottom right.

Editing a Caregiver – Records



History Tab

The History tab can be used to review any changes to the Caregiver's record that have been made in RegistryConnect.

Date ↓	Field Name	Old Value	New Value
04/13/2020 12:57 PM	Insert by Soulard, Raymond Disable AIM Messaging Notification:		true
04/13/2020 12:57 PM	Update by Soulard, Raymond AIM Recipient:	true	false