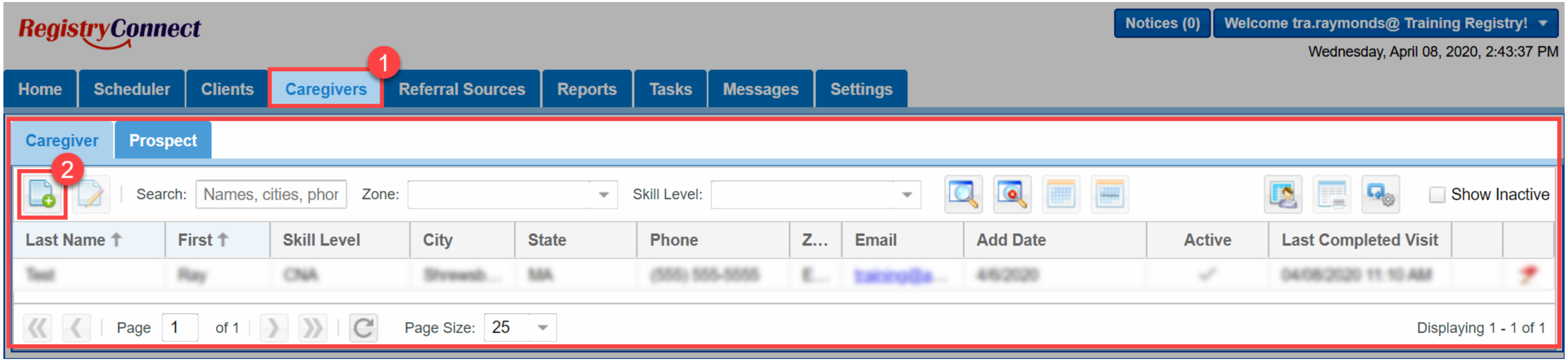
RegistryConnect Training

Adding & Inactivating Caregivers

Adding a Caregiver – Getting Started

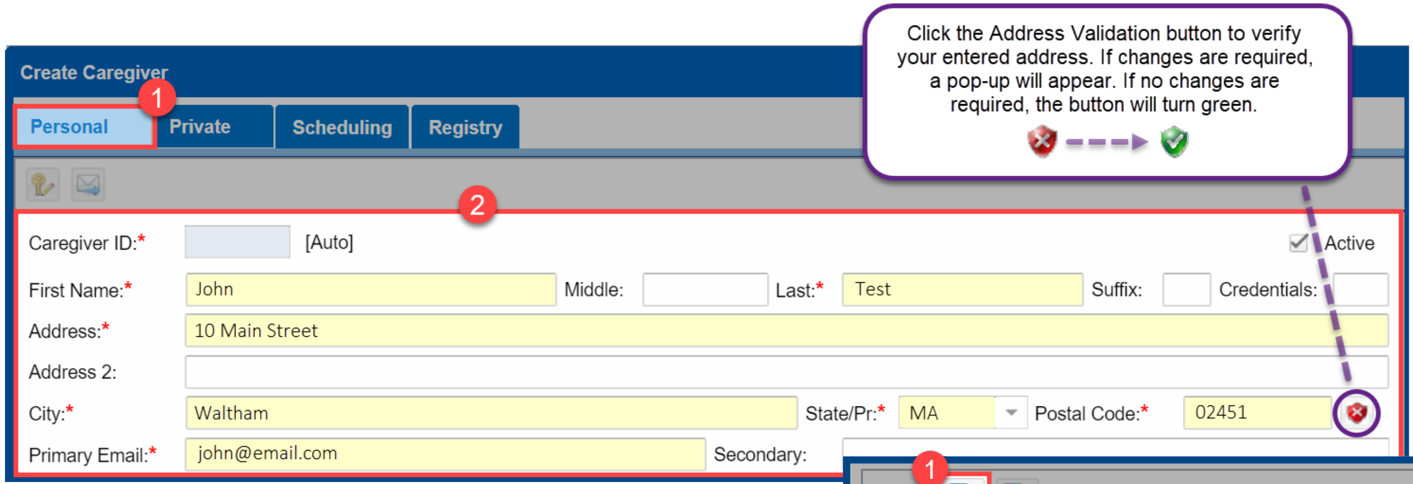
Adding a Caregiver in RegistryConnect can be accomplished in a few simple steps. Start by selecting the Caregivers tab. Once selected, click on the Add button.



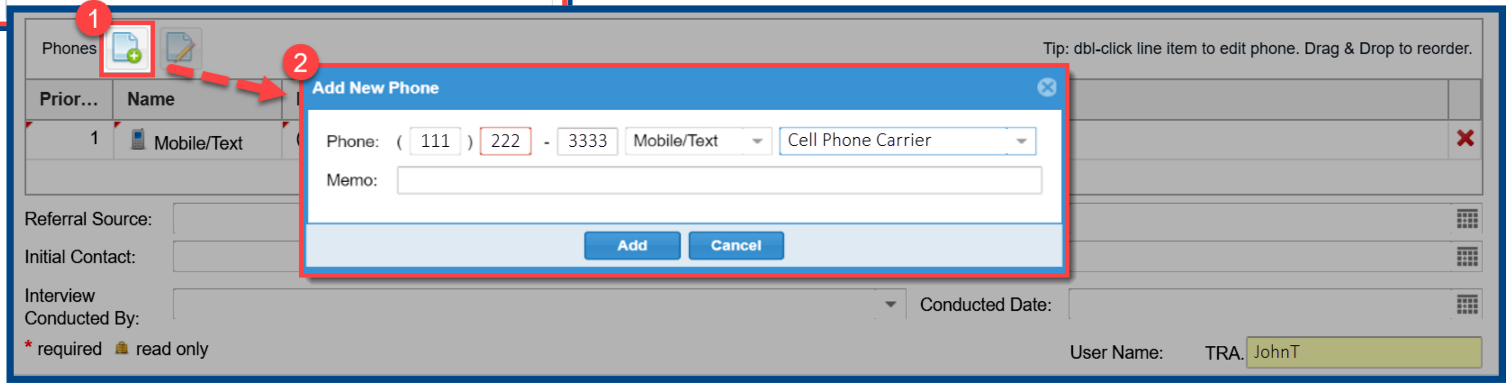
To learn how to set up the dropdown options for caregiver tab fields, see the RegistryConnect Configuration training

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.



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



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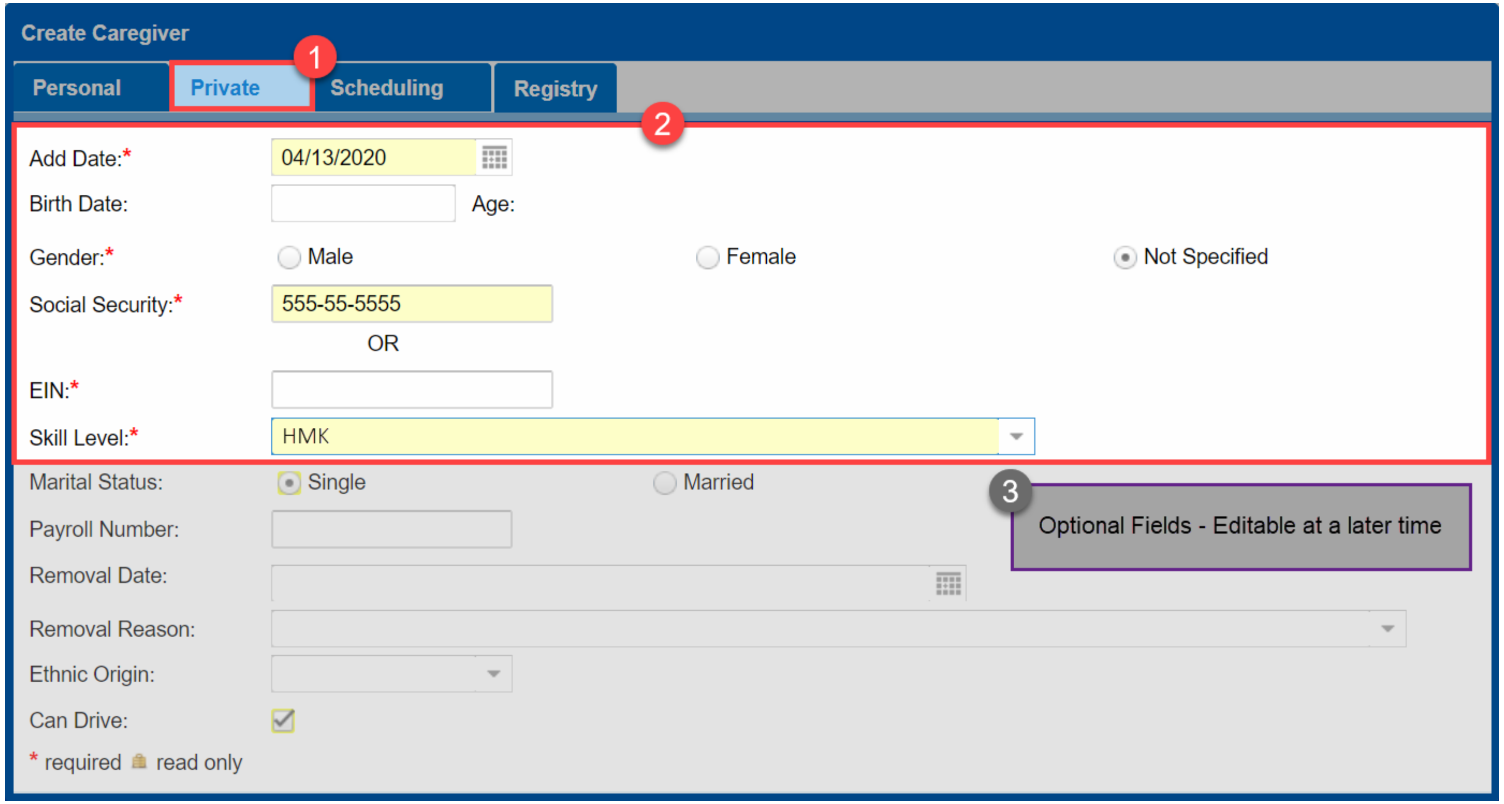
Adding a Caregiver – Private Information

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.



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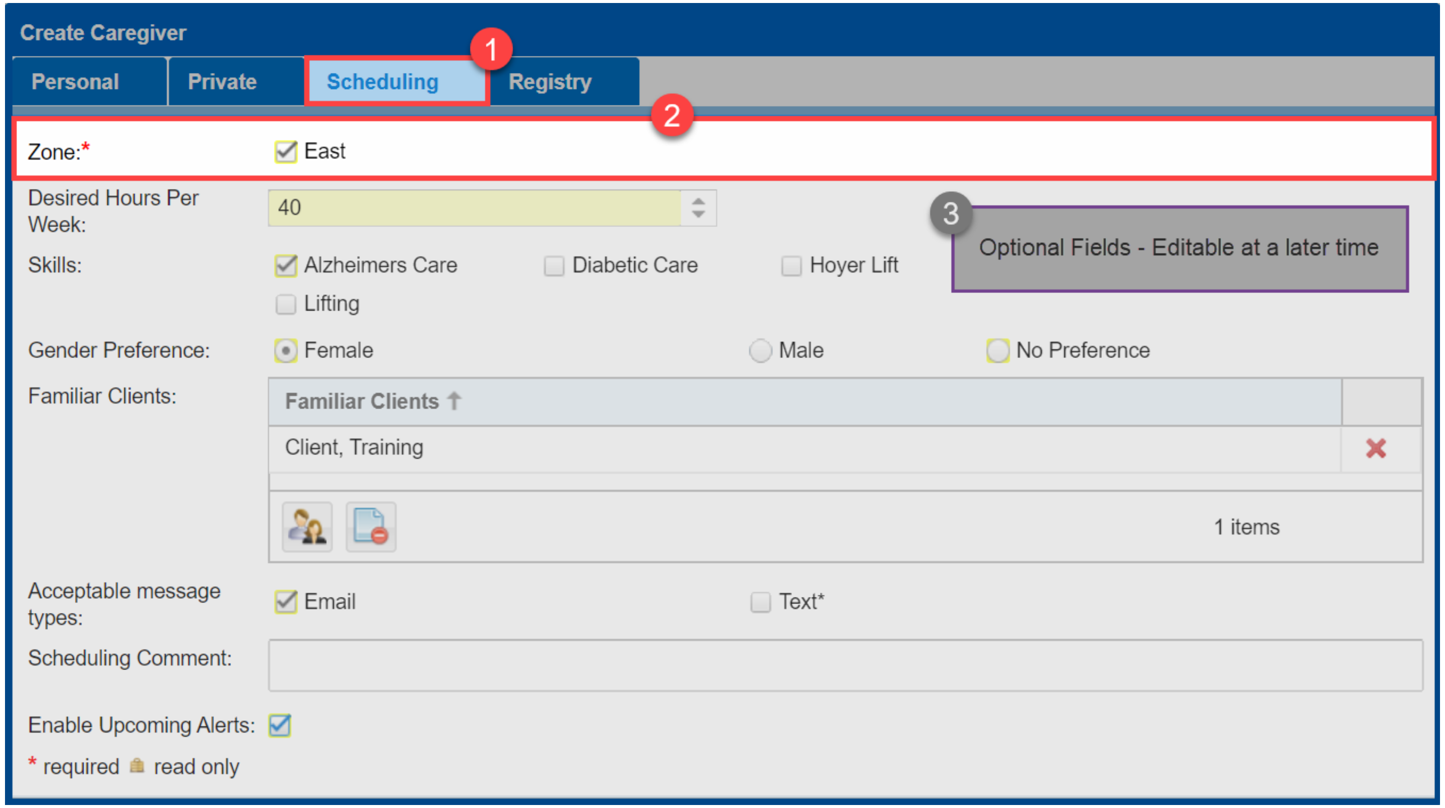
Adding a Caregiver – Scheduling Information

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).



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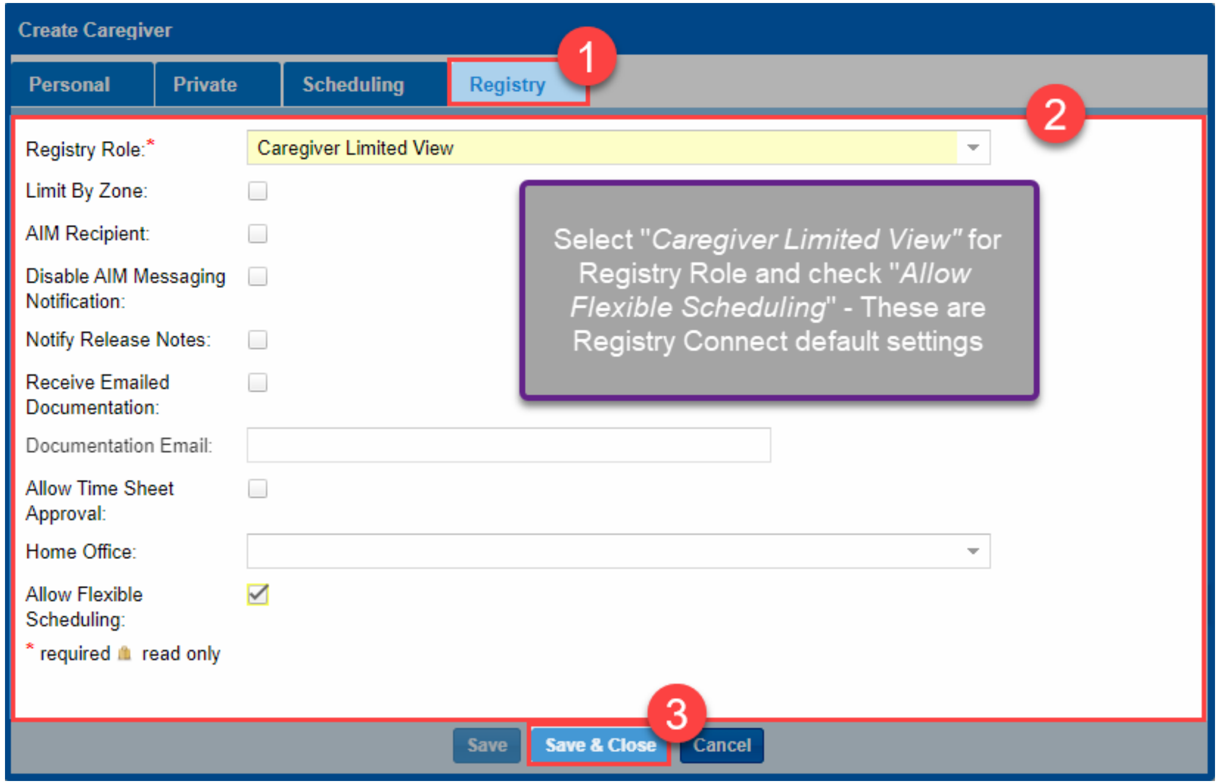
Adding a Caregiver – Registry Information

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.



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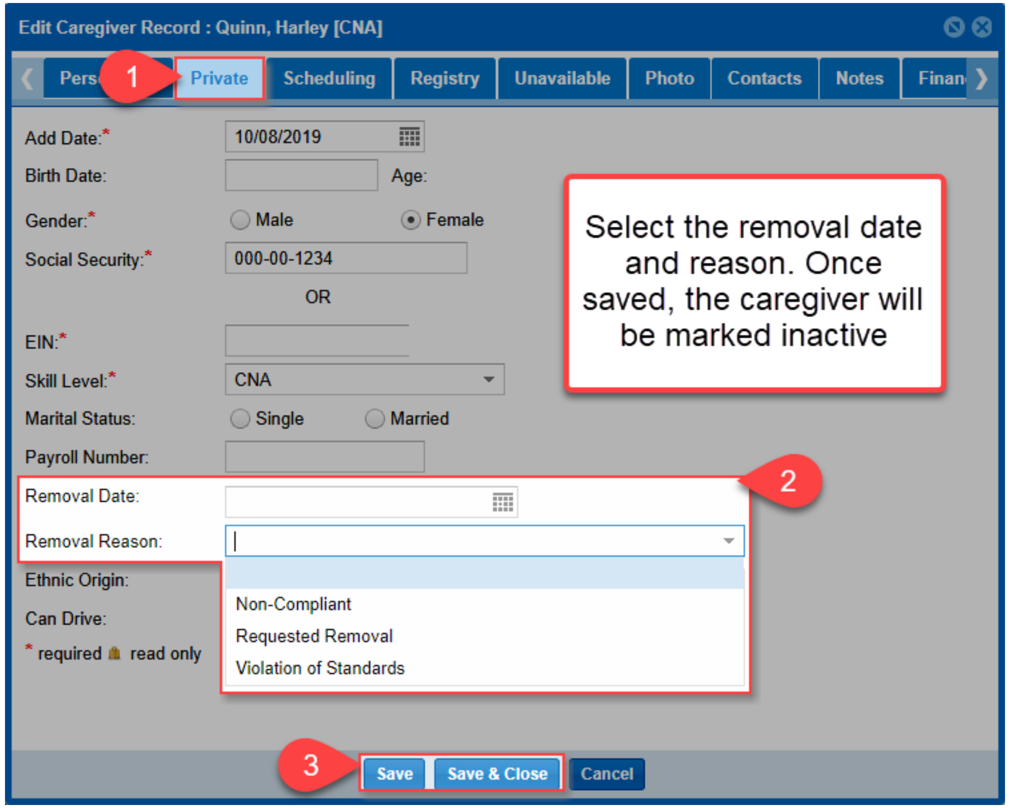
Inactivating a Caregiver

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



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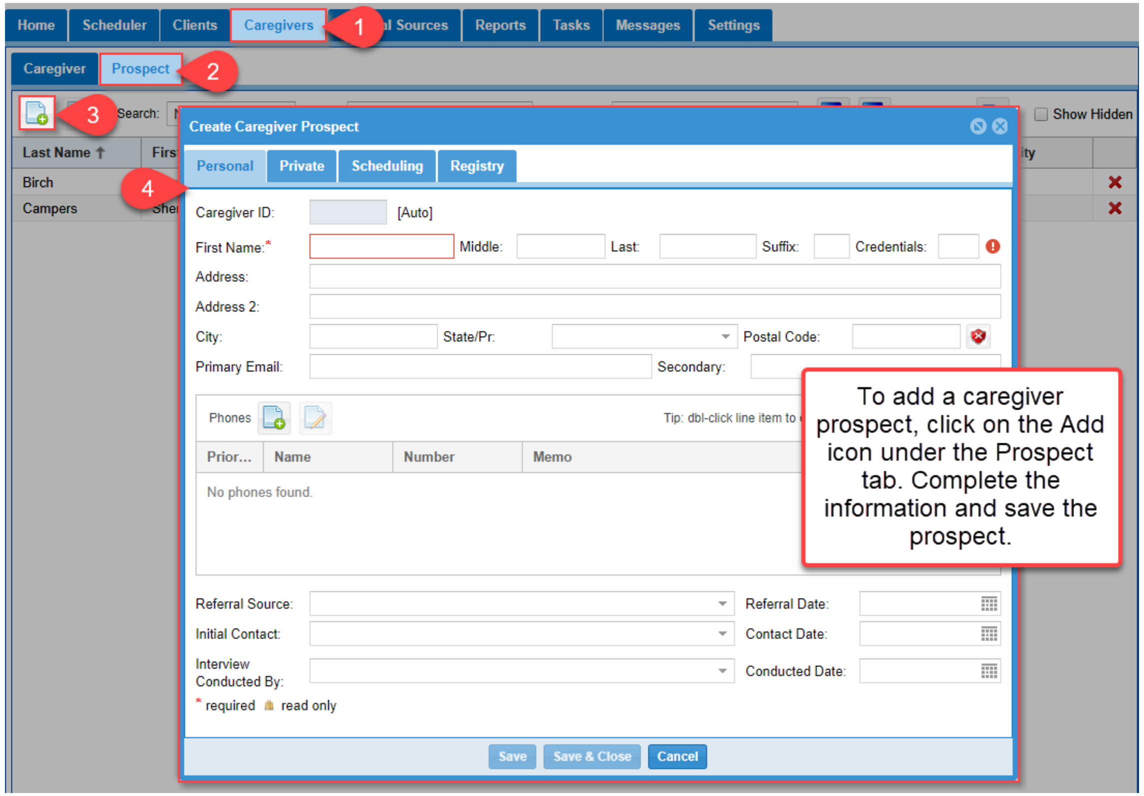
Creating Caregiver Prospects

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

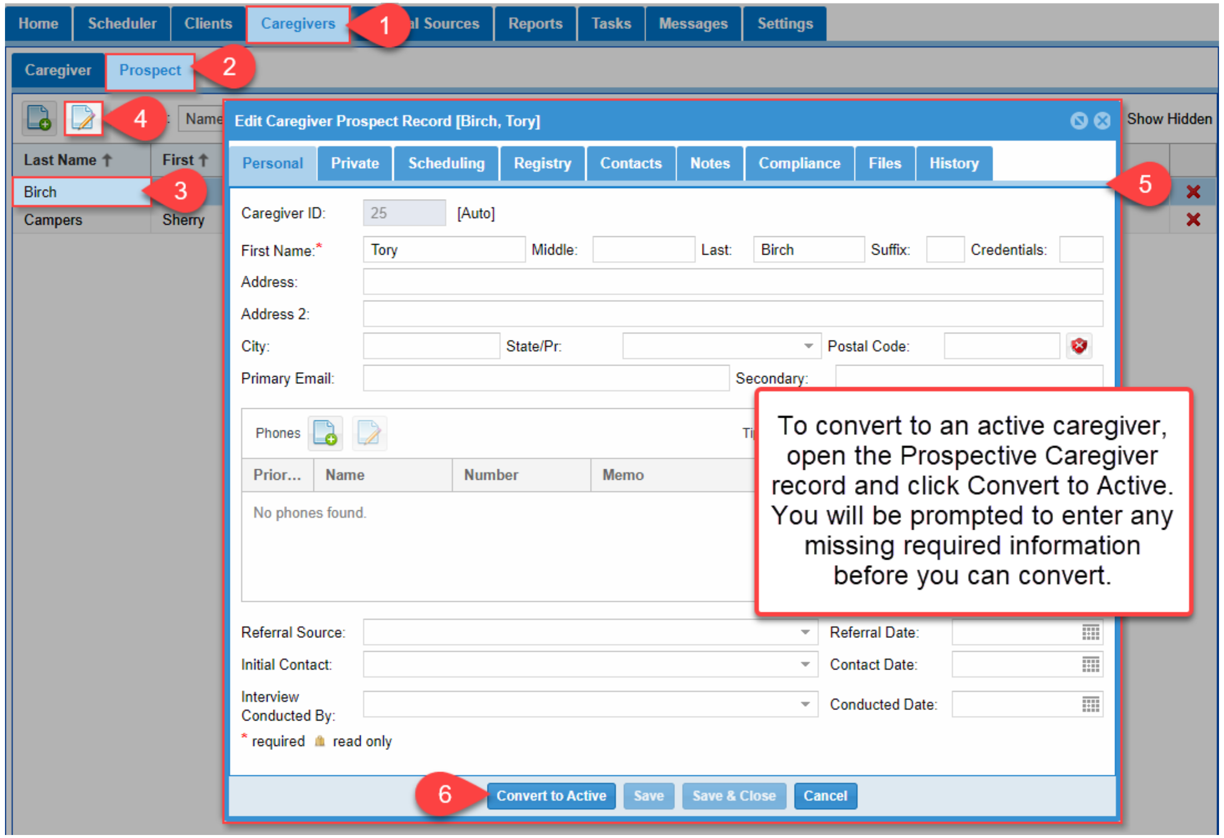


To learn how to set up the dropdown options for client tab fields, see the RegistryConnect Configuration training

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



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

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

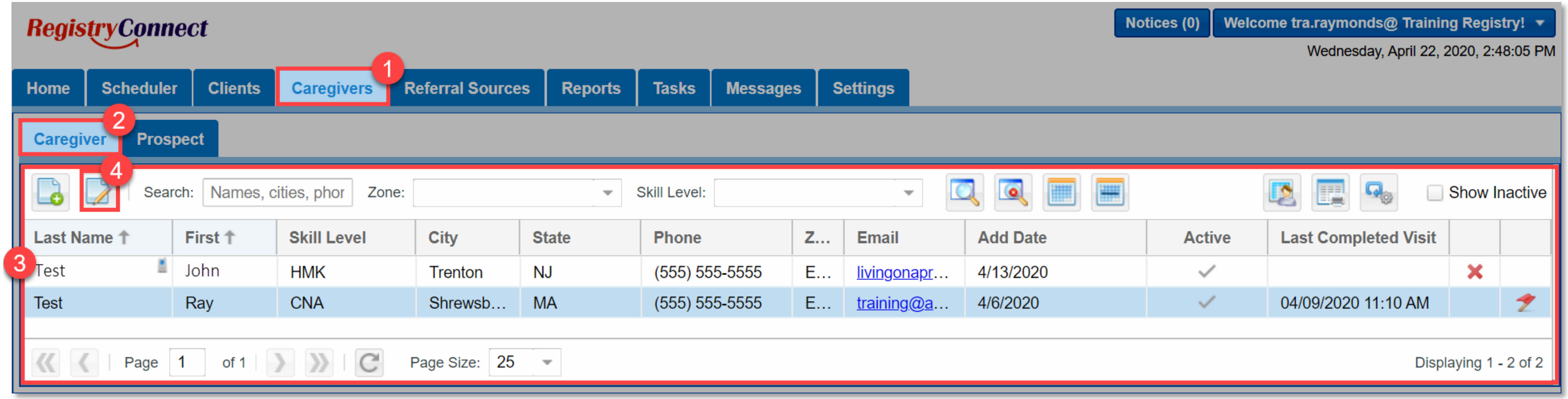
Manage employment / payment info

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.



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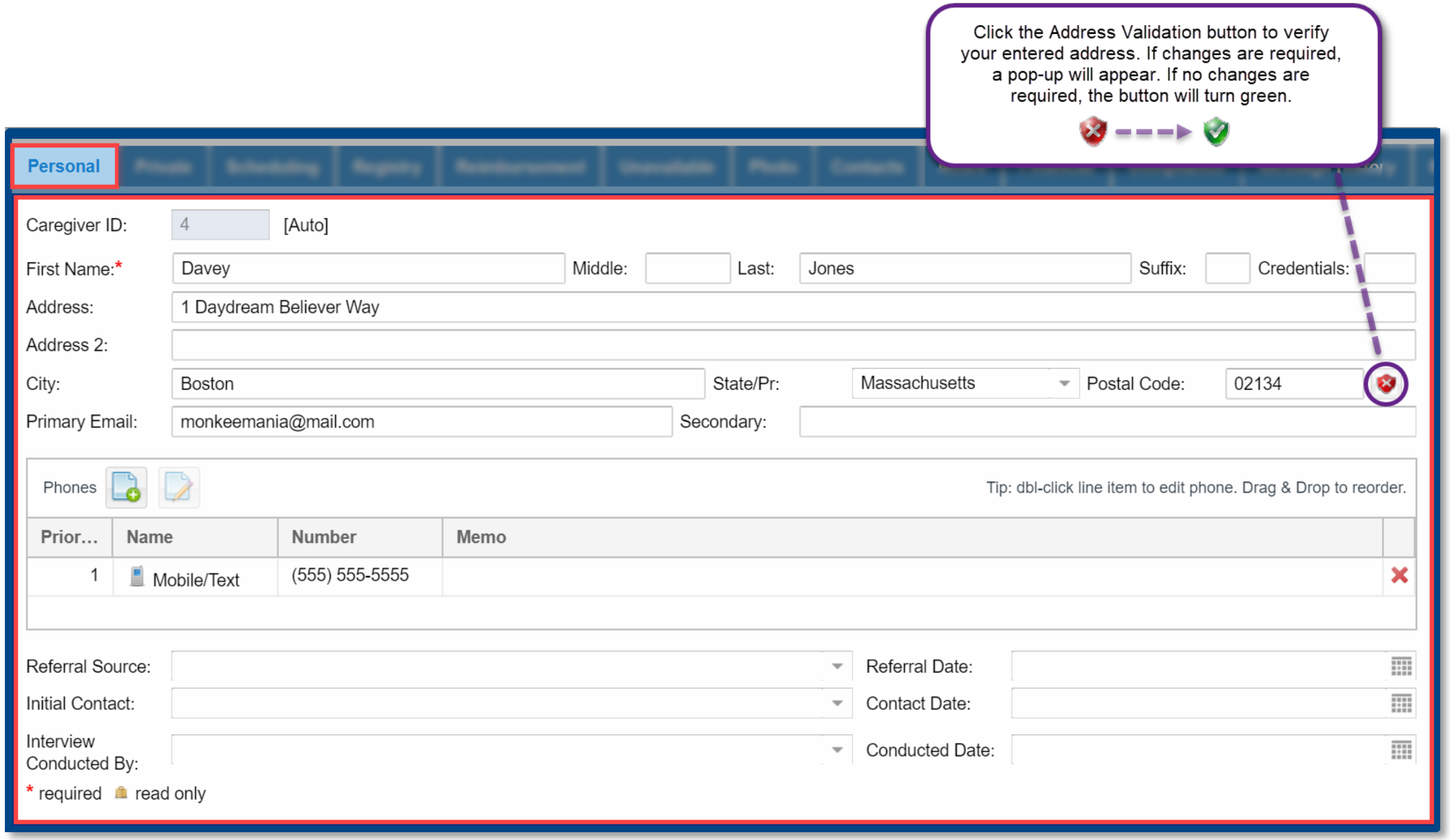
Editing a Caregiver – Editing Information

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



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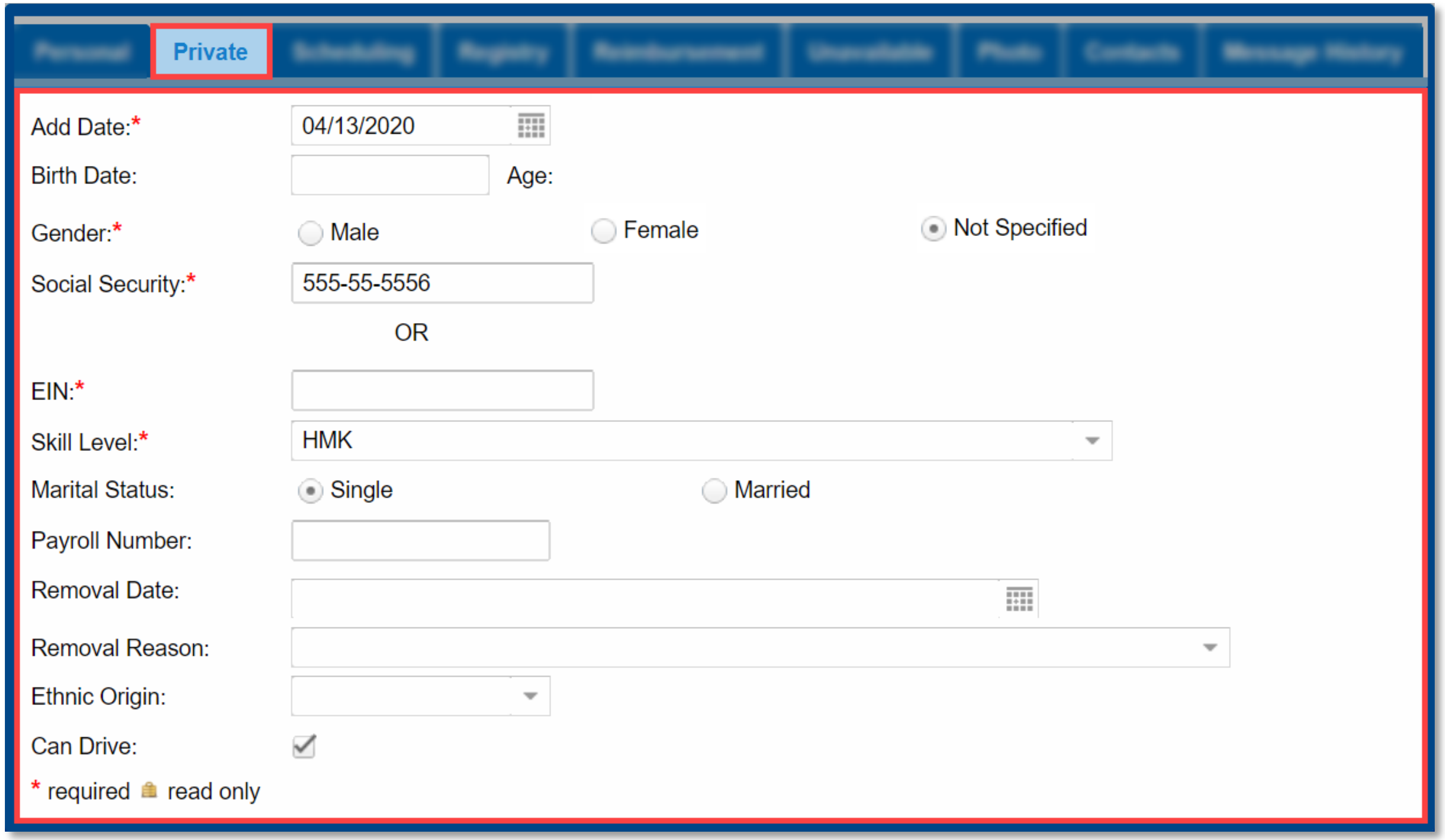
Editing a Caregiver – Editing Information

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



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

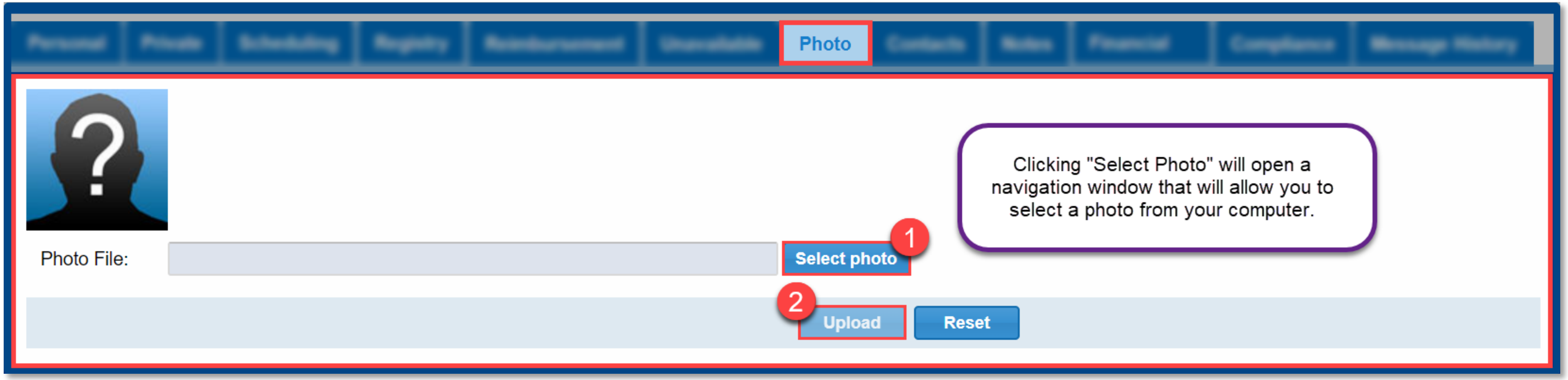
Editing a Caregiver – Editing Information

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



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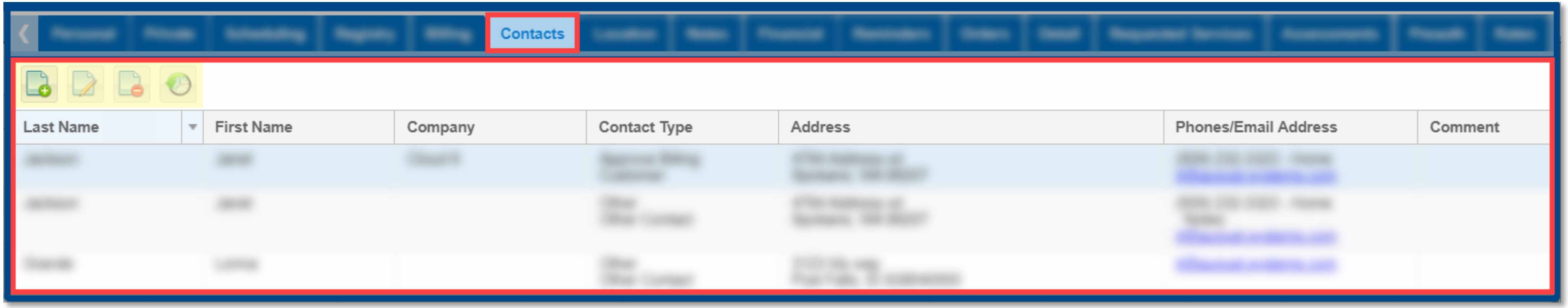
Editing a Caregiver – Editing Information

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.



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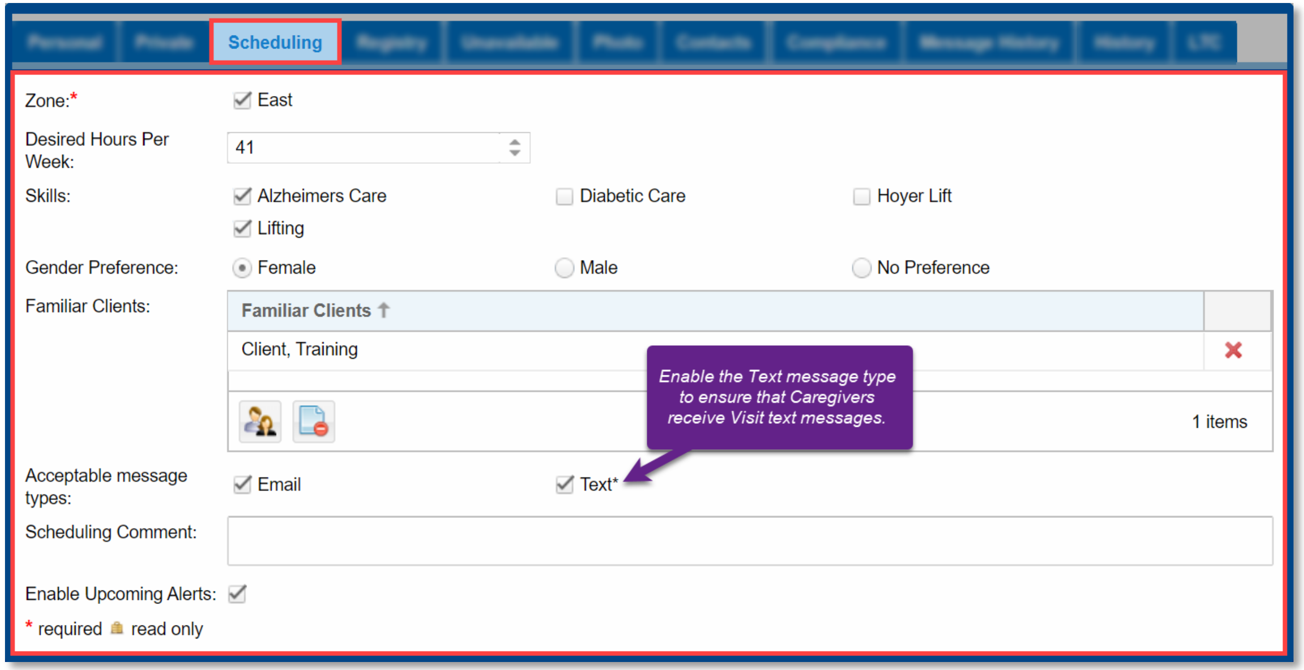
Editing a Caregiver – Scheduling

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



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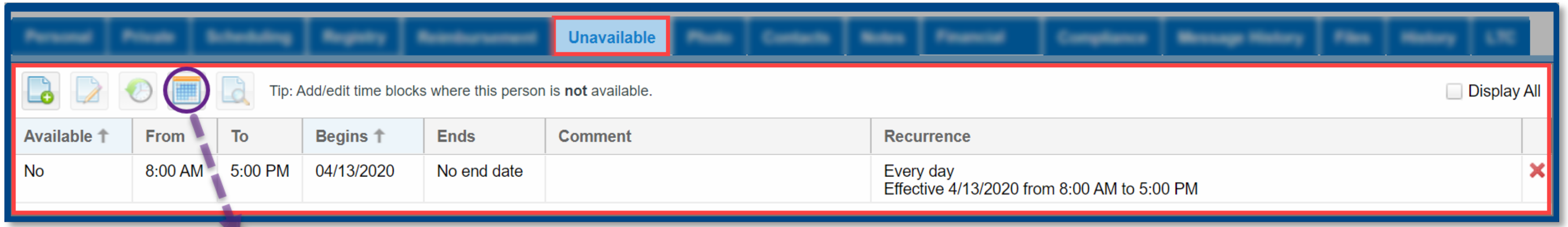
Editing a Caregiver – Scheduling

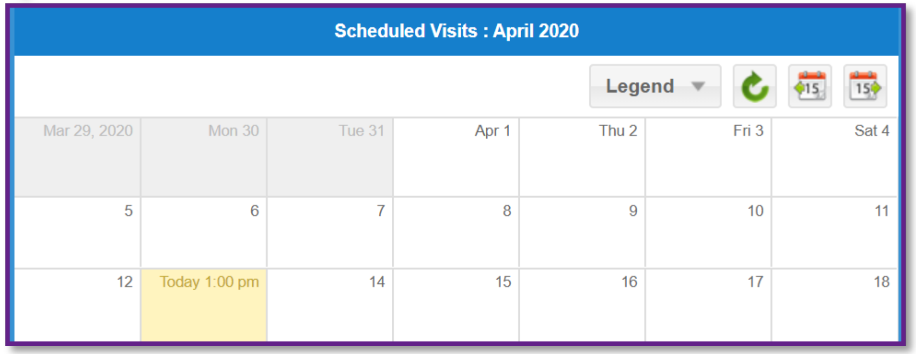
Unavailable Tab

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





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

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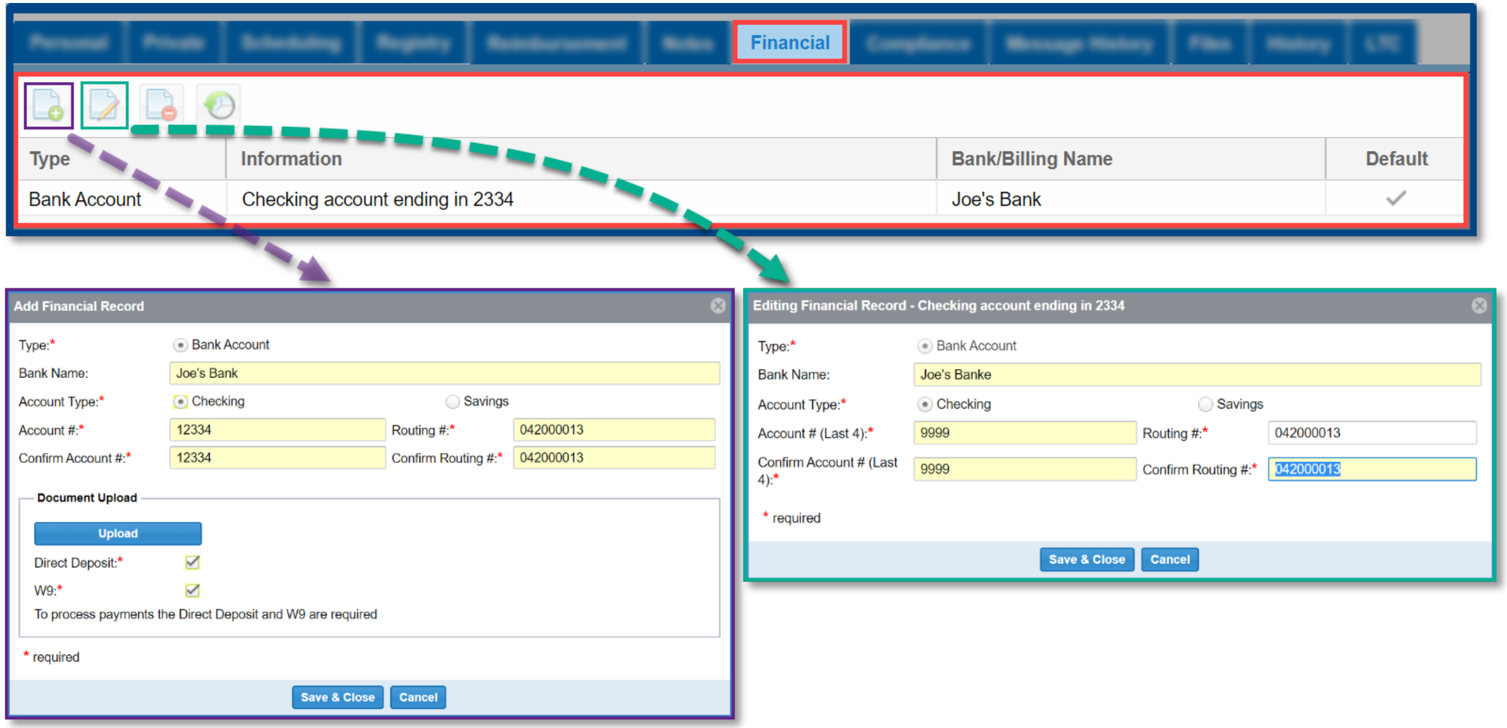
Editing a Caregiver – Billing

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



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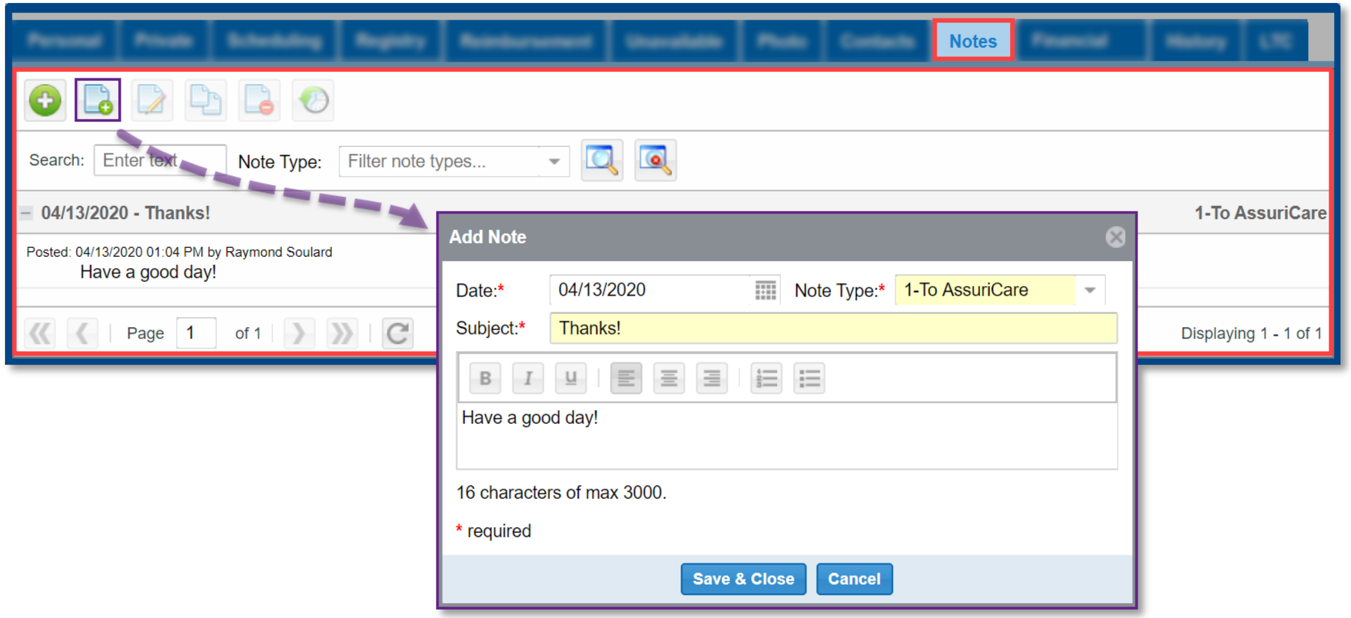
Editing a Caregiver – Records

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.



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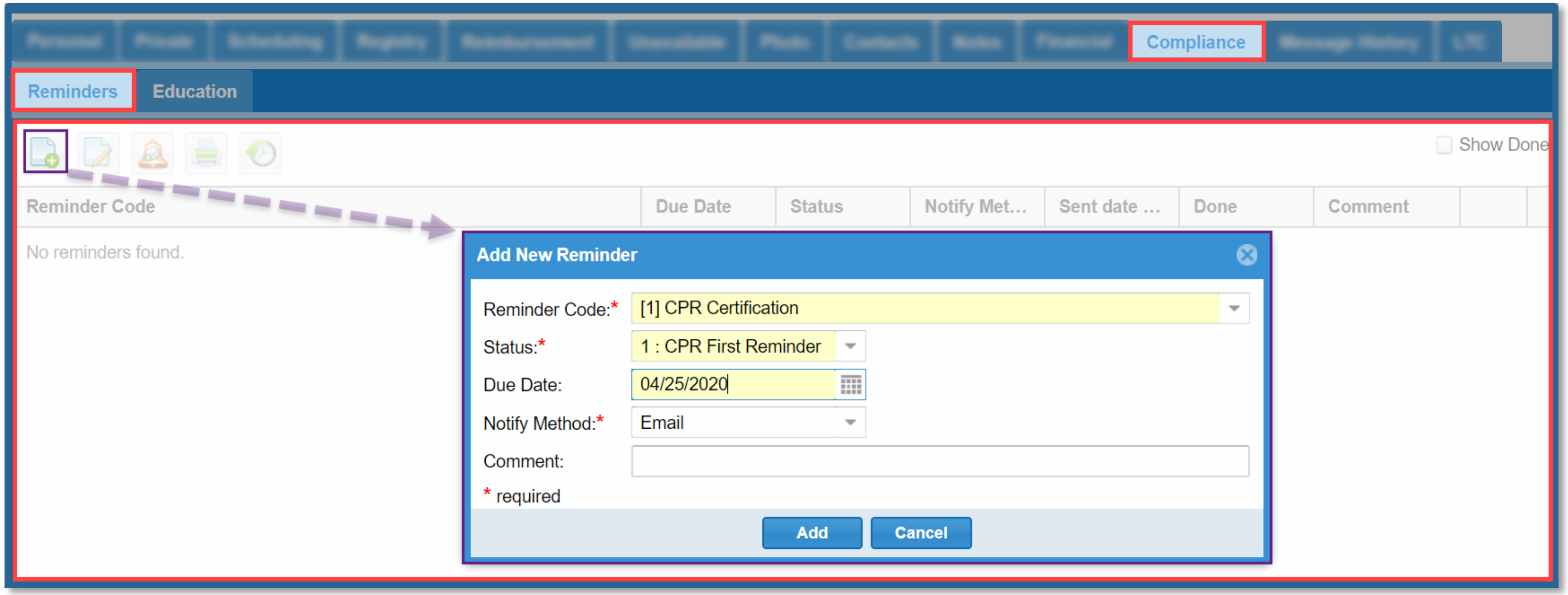
Editing a Caregiver – Records

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



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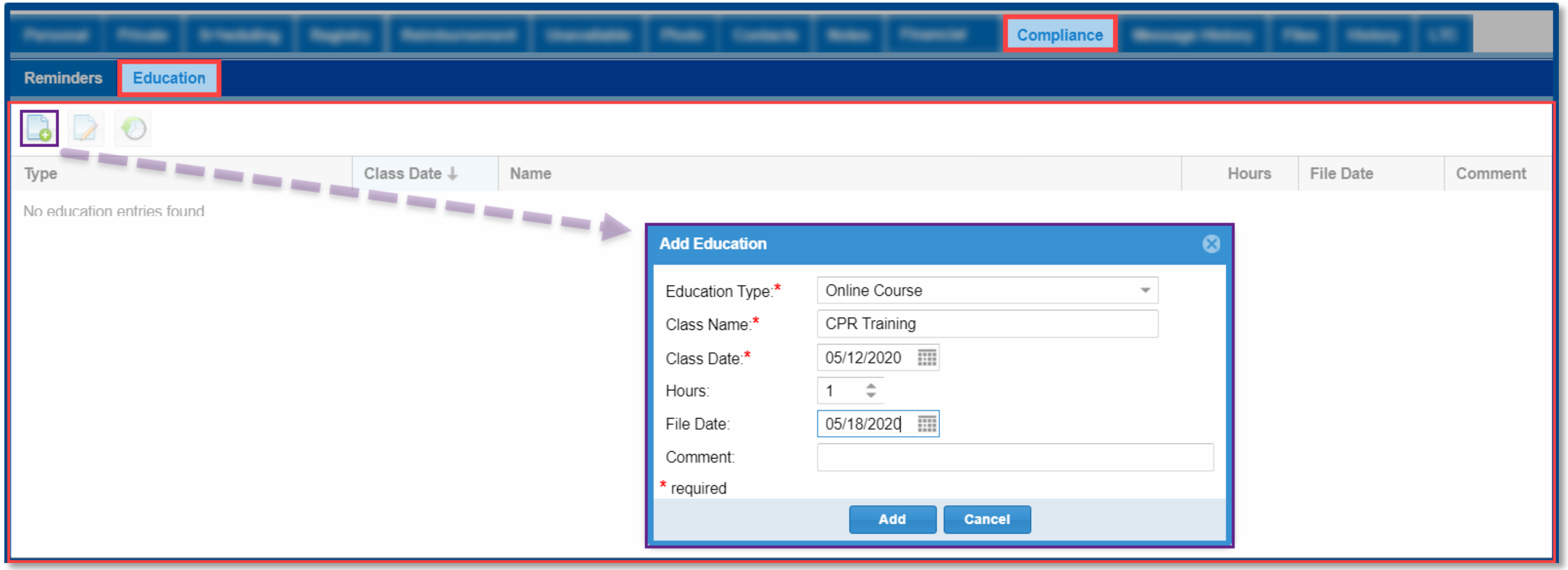
Editing a Caregiver – Records

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



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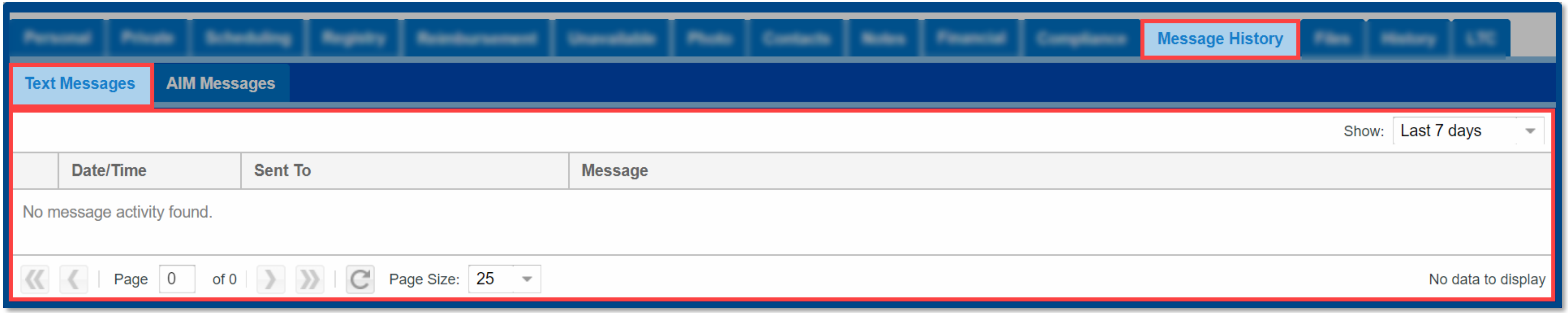
Editing a Caregiver – Records

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.



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Editing a Caregiver – Records

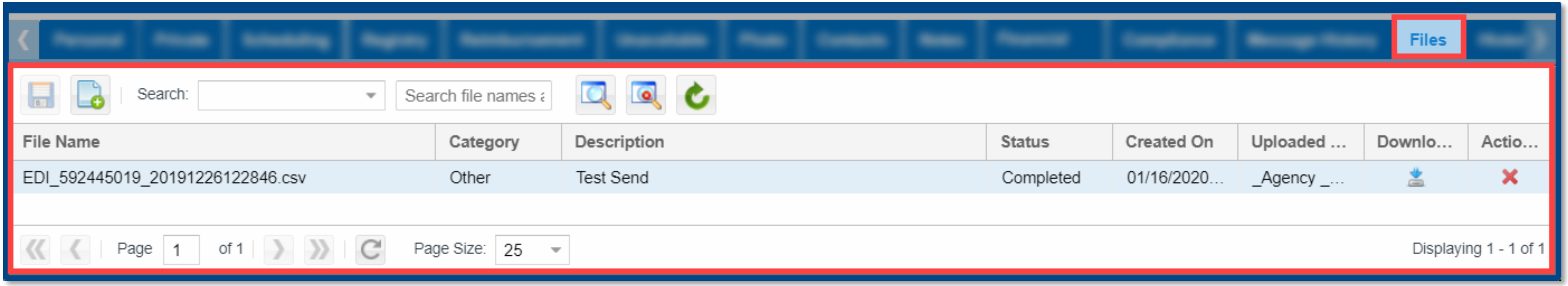
Files Tab

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



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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.

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