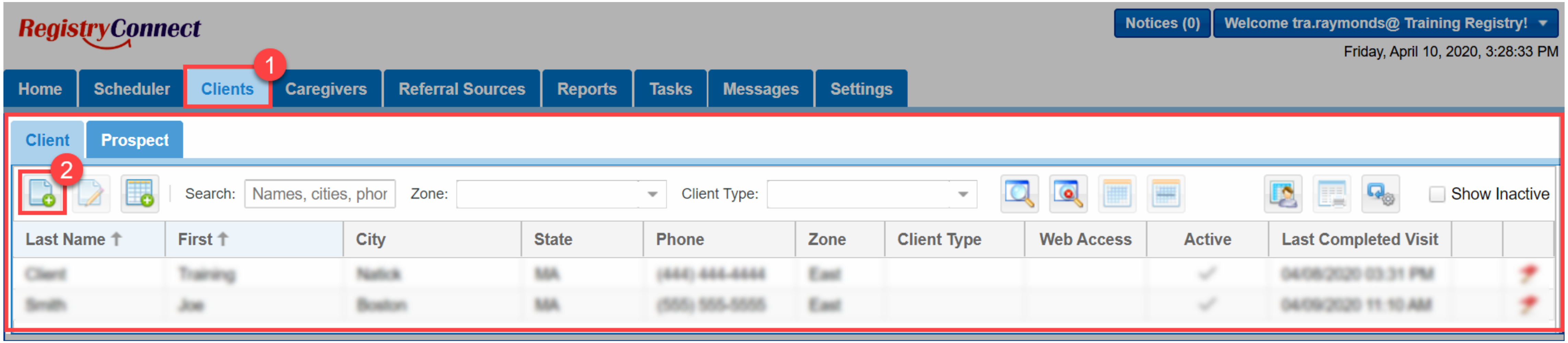
RegistryConnect Training

Adding & Inactivating Clients

Adding a Client – Getting Started

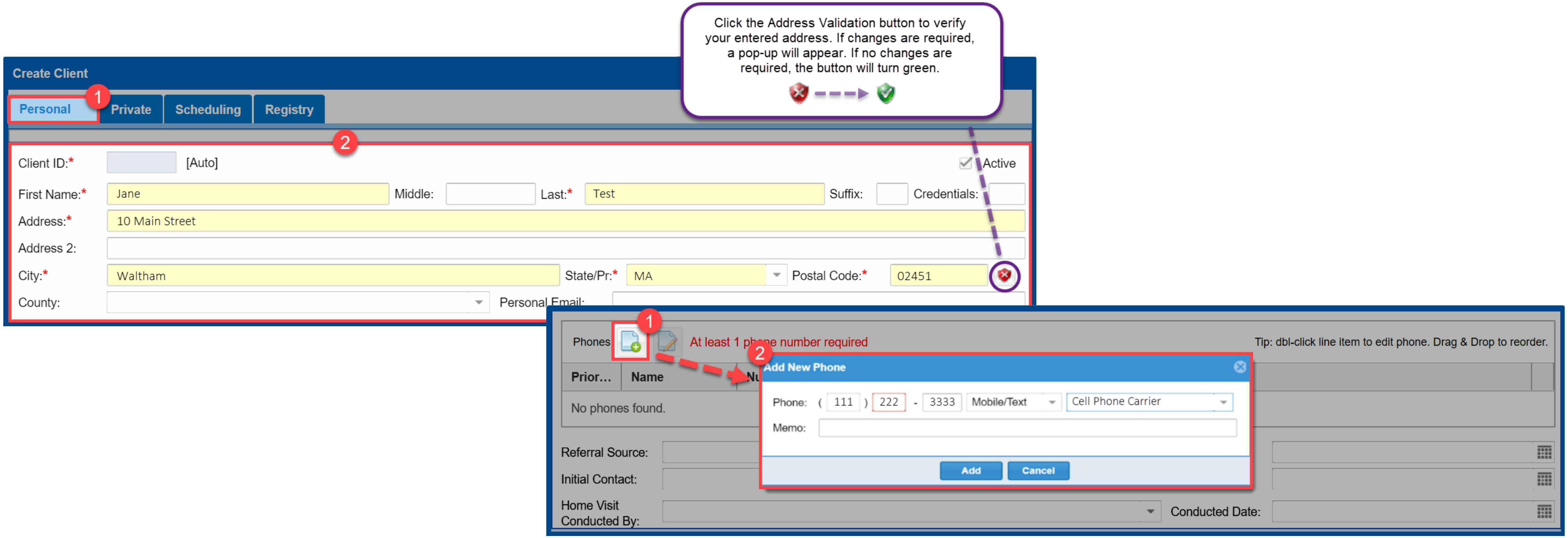
Adding a Client in RegistryConnect can be accomplished in a few simple steps. Start by selecting the Client tab. Once selected, click on the Plus button.



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

Adding a Client – Personal Information

The first of four input tabs is the Personal tab. Here you enter general information for the Client. Items that are required for this step are marked with red stars. To add phone numbers to a Client, select the Plus button, input their complete phone information and click Add. Multiple numbers can be dragged into priority order.

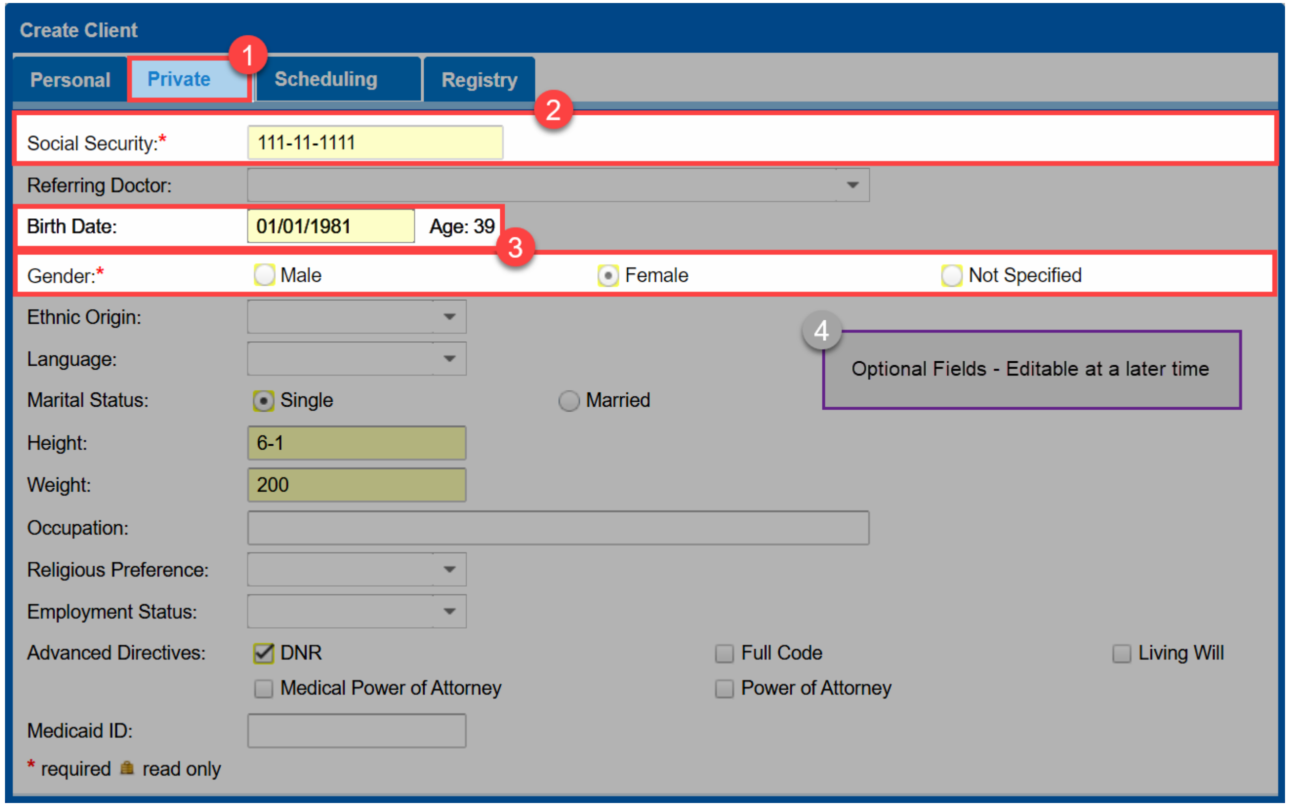


To learn how to set up the dropdown options for client tab fields, see the RegistryConnect Configuration training

Adding a Client – Private Information

The second tab is the Private tab. Here, input the Client's Social Security Number and their Date of Birth, select their Gender, and input any available option information.

- The social security number will be used if the client elects to have AssuriCare generate year-end tax documents.



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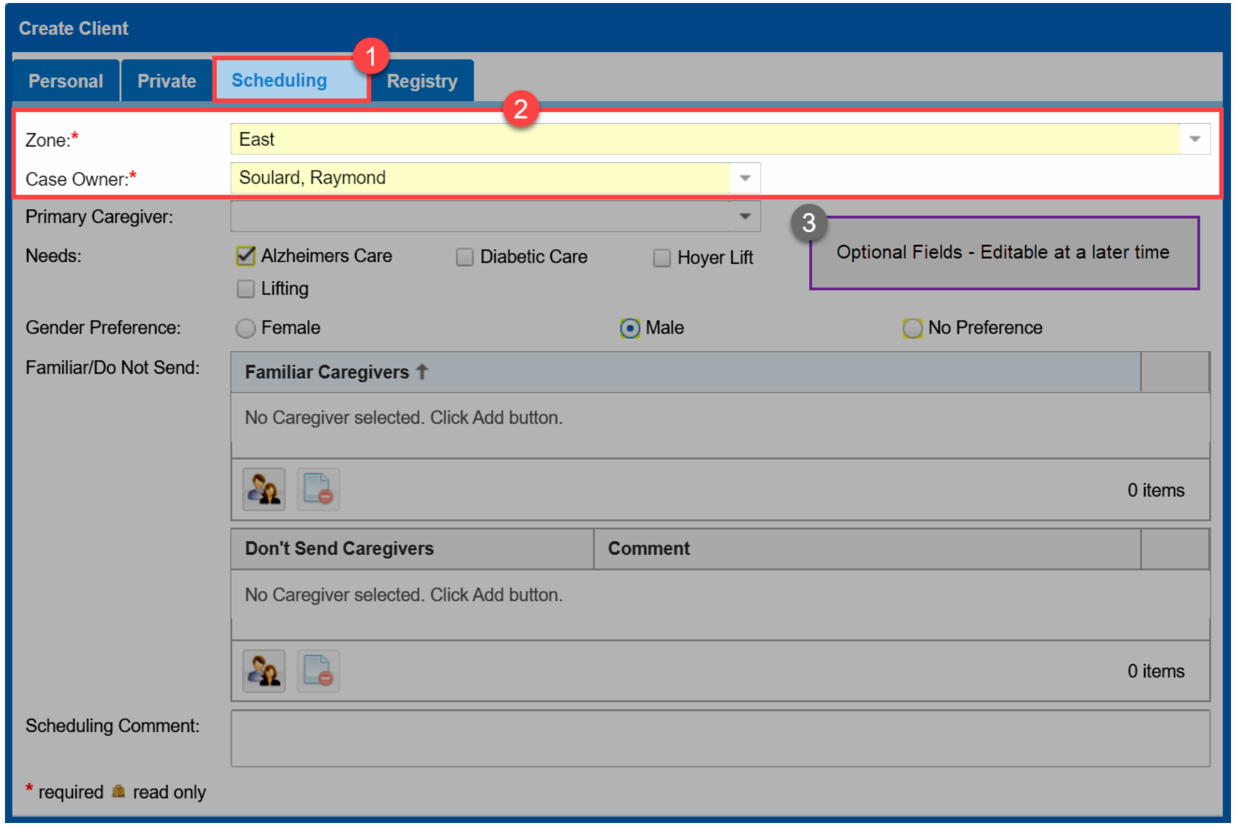
To learn how to set up the dropdown options for client tab fields, see the RegistryConnect Configuration training

Adding a Client – Schedule Information

From the Scheduling tab, you must select the Client's service Zone and Case Owner. You may then enter in any available optional information.

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



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

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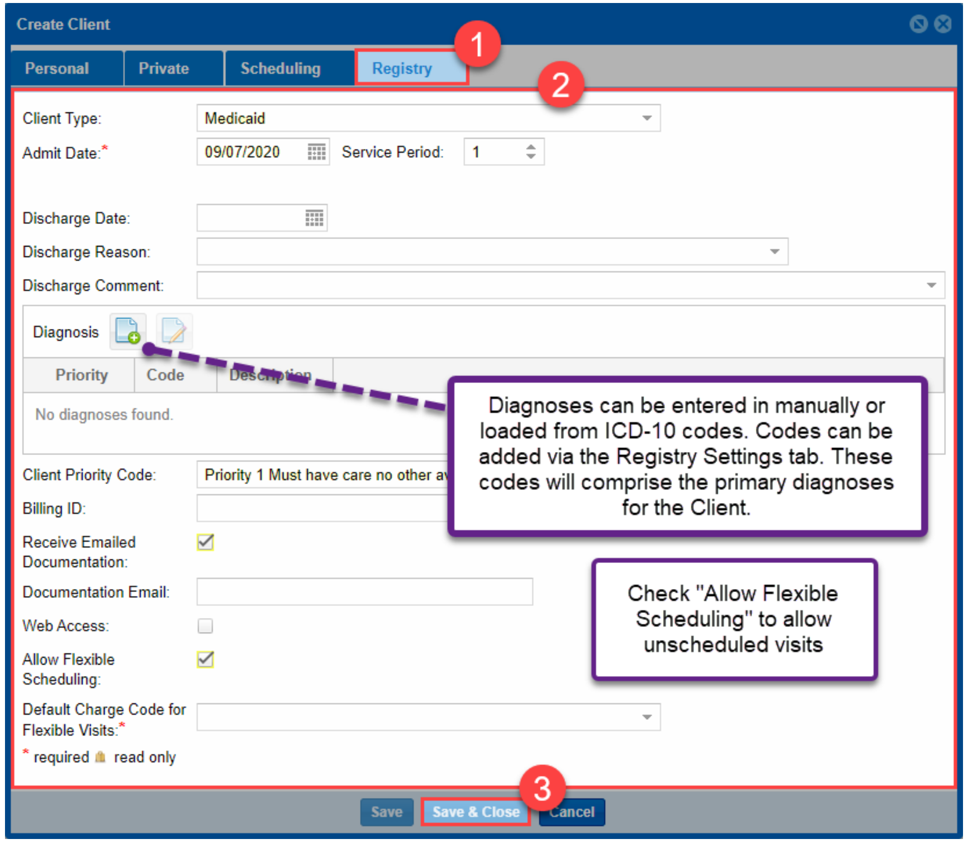
Adding a Client – Registry Information

Finally, from the Registry tab, input any available information in the provided fields. Once complete, click Save and Close.

- The client type refers to the payer – often this is Private Duty, LTCI, or Medicaid.
- List any diagnoses or client priority information necessary
- Diagnoses codes can either be entered as ICD codes or freeform
- Allow Flexible scheduling should be checked off. This is a default setting.



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

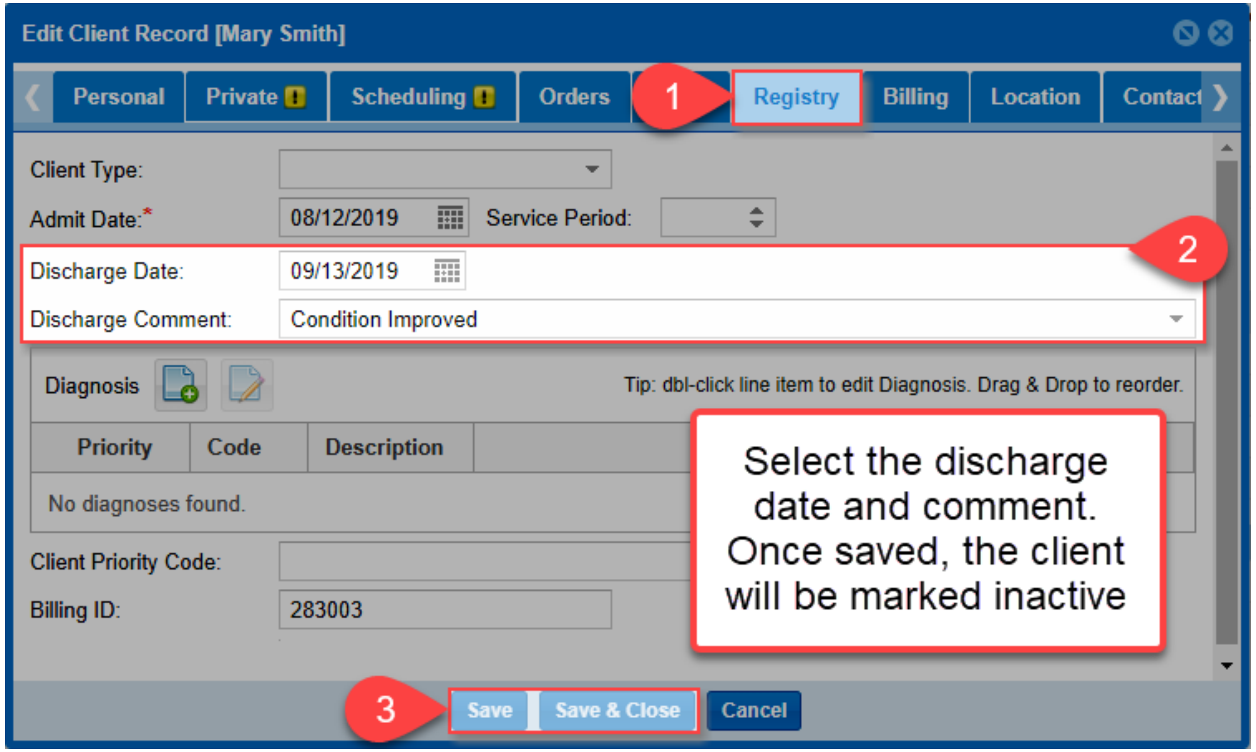
Inactivating a Client

Inactivating a Client in RegistryConnect is straightforward as well. Simply click into the client and then select the discharge date and reason on the Registry tab.

AssuriCare strongly recommends waiting until all visits have been completed and paid before inactivating the client. Paid visits will show as dark green on the scheduler.

Once inactivated:

- Any active orders will end
- Caregivers will not be able to check in or out for that client
- When looking at client reports, you can elect to include inactive caregivers or exclude them



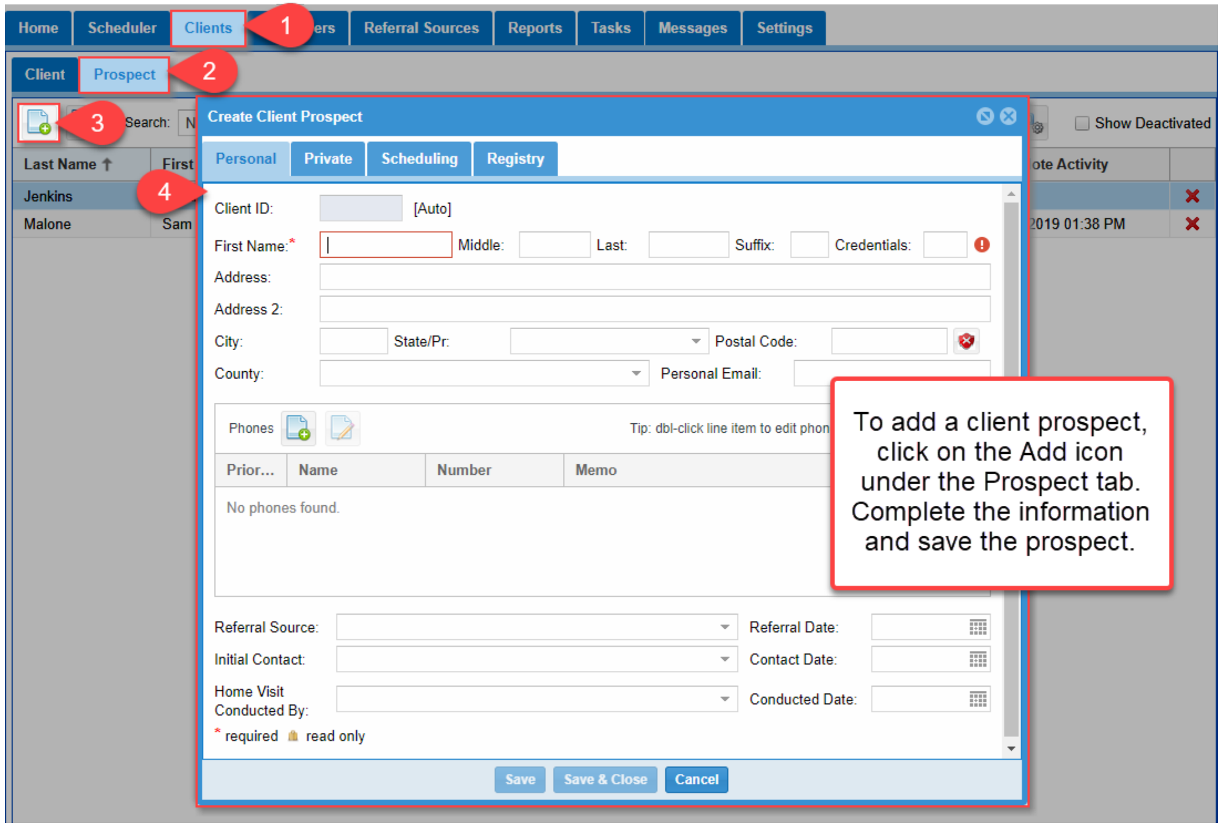
To learn how to set up the dropdown options for client tab fields, see the RegistryConnect Configuration training

Creating Client Prospects

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

With client prospects you can track:

- Contact information
- Referral sources
- Potential client needs
- Additional demographic and scheduling information



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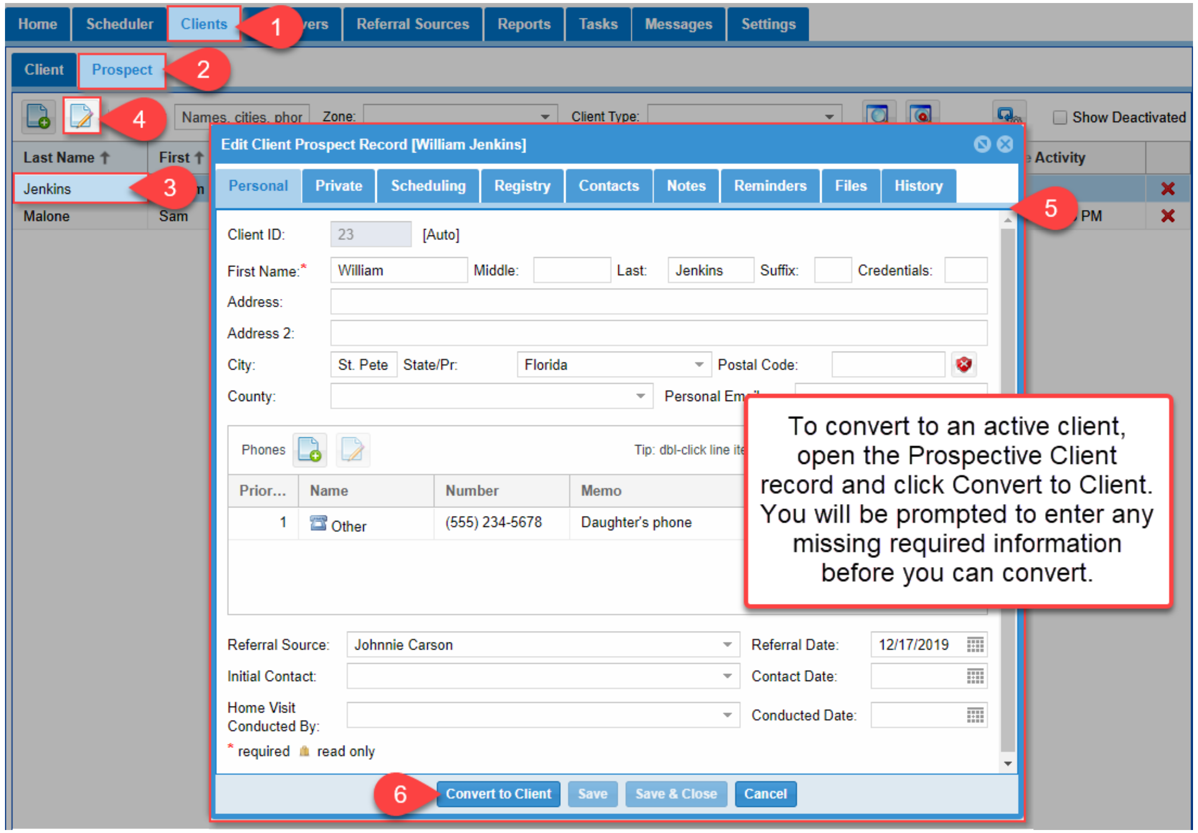
To learn how to set up the dropdown options for client tab fields, see the RegistryConnect Configuration training

Converting Client Prospects to Active

When you are ready to convert a client prospect to active, simply open the Prospective Client record and click Convert to Client.

- When you convert the client, RegistryConnect will prompt you to enter any required information before allowing conversion. For example:
  - Full Address
  - Birth Date
  - Social Security Number
  - Case Owner
- Once converted you will be able to schedule visits for the new client



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

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RegistryConnect Training

Editing Clients

Editing a Client – The Basics

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

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

Editing a Client – The Basics

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

Edit Information

Update personal and private info
Manage contacts
Discharge clients

Scheduling

Set up orders
Establish client zones

Billing

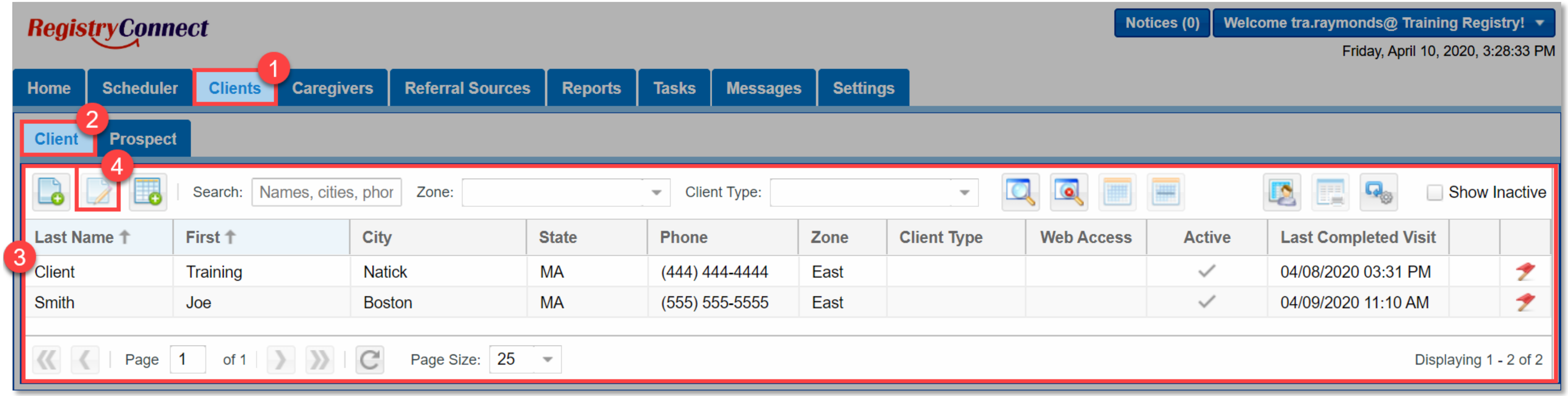
Set rates
Add and update payment info

Records

Set reminders
Add notes
Manage documents

Editing a Client – Getting Started

To access the editing options for a Client within RegistryConnect, navigate to the Clients tab, select the Client you'd like to manage, and then click the edit icon. Alternatively, Client names may be double clicked to open the edit functionality.



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

Editing a Client – Editing Information

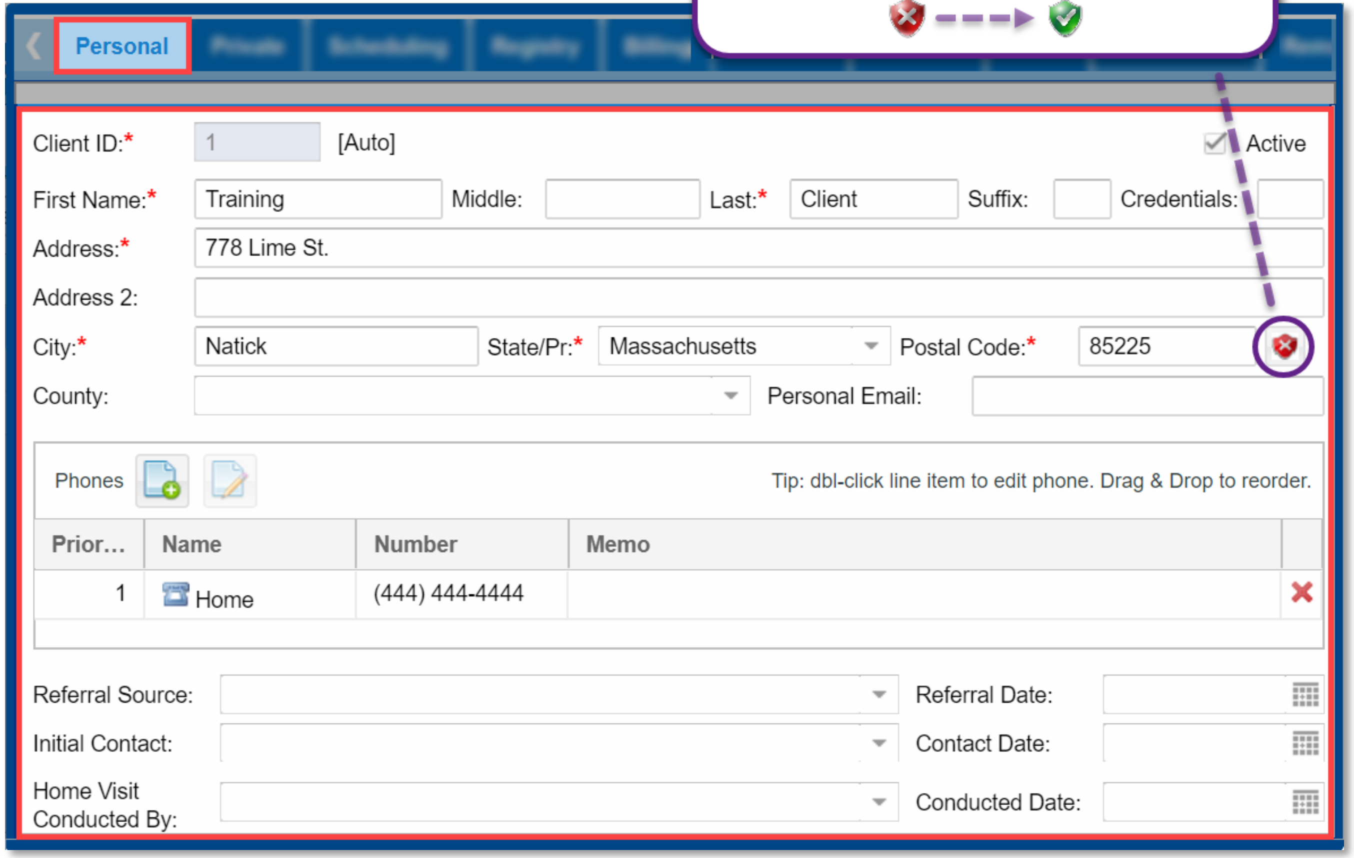
Personal Information Tab

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

Common Actions:

- Updating a Client's address after a move
- Adding, removing, or updating a Client's phone information
    - Multiple numbers can be dragged and dropped in order of priority.
- Correct spelling issues

If the Client's address is changed, click the Address Validation button to verify the newly entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.



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

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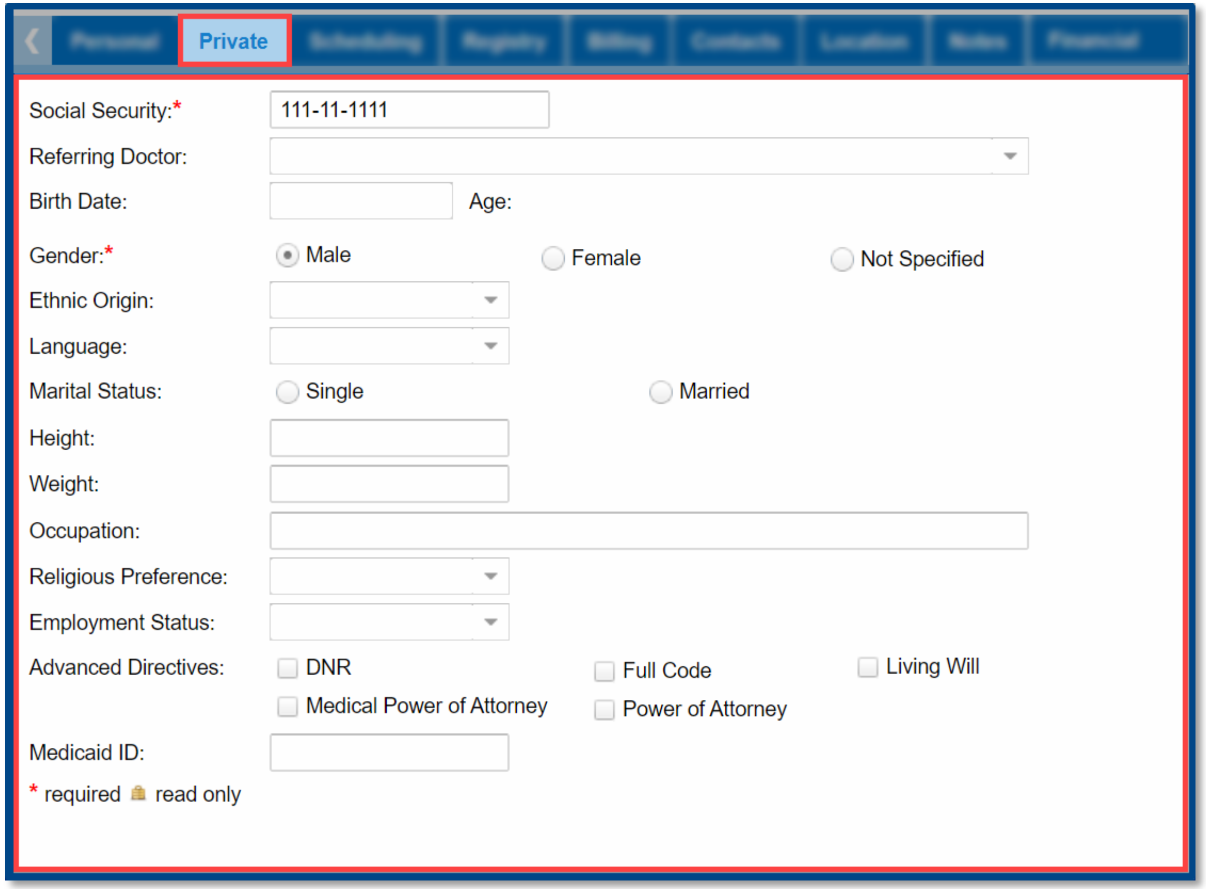
Editing a Client – Editing Information

Private Information Tab

Use the Private tab to edit a Client's secure information, such as SSN, birth date, and marital status.



Common Actions:

- Correcting issues with information entered during the Adding a Client process
- Adding Advanced Directives or a Medicaid ID

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

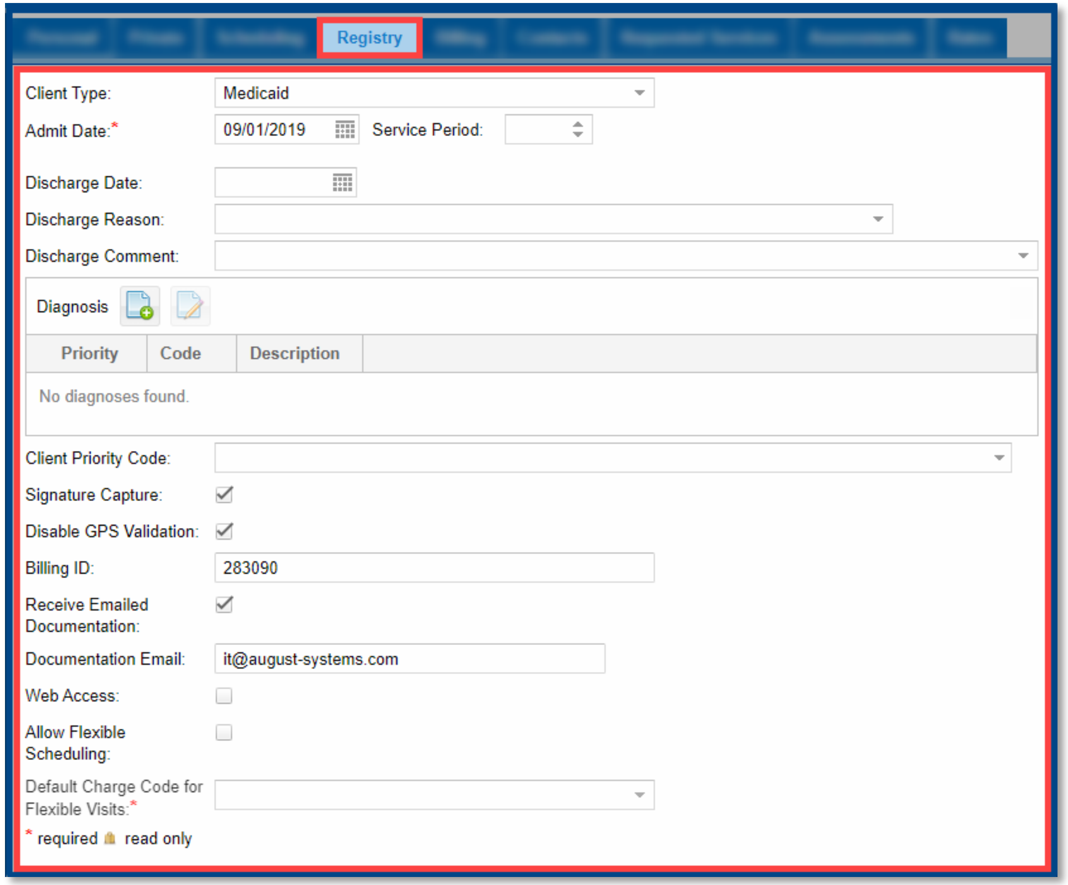
Editing a Client – Editing Information

Registry Tab

Use the Registry tab to edit a Client's Registry status. This page is primarily used to for Client discharge purposes.

Common Action:

- Discharge a client and input discharge specifics
- Once a Discharge date and reason is entered, the client will be marked as inactive. Make sure that all visits are complete and paid before making a client inactive.



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

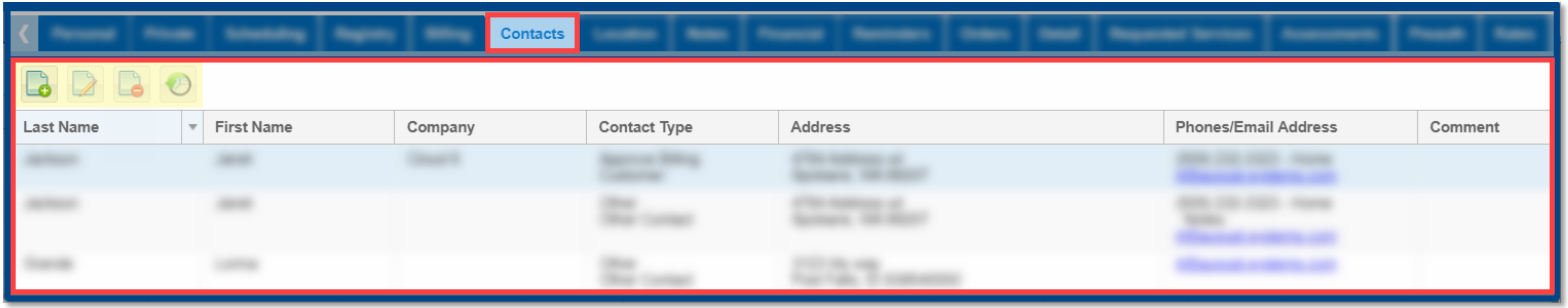
Editing a Client – Editing Information

Contacts Tab

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

Common Actions:

- Add new primary contacts to the Client's account



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

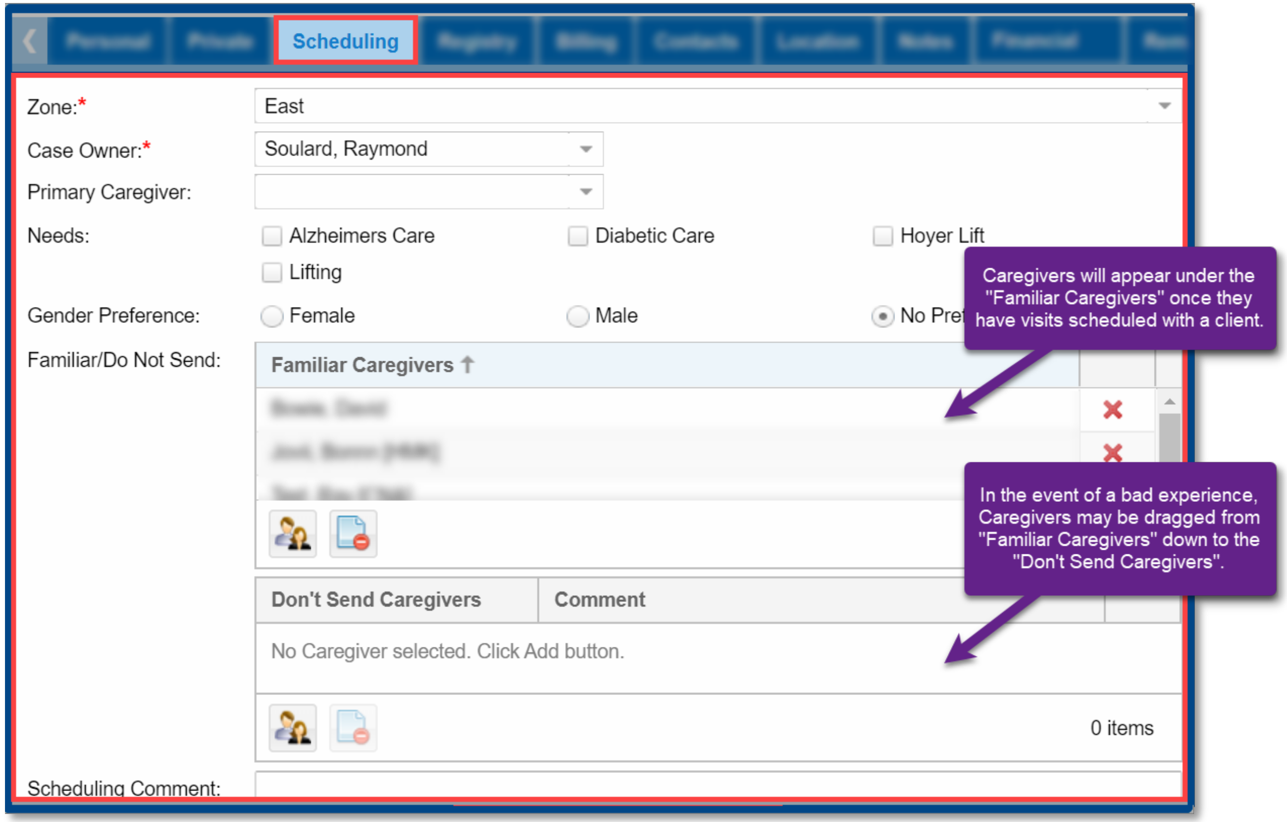
Editing a Client – Scheduling

Scheduling Tab

Use the Scheduling tab to edit information relating to a Client's scheduling parameters, such as their Zone and Case Owner.

Common Actions:

- Modify the Client's Zone designation. Each client is assigned to one zone.
- Select a new Case Owner
- Edit the Client's Needs. These will be used to match with Caregiver Skills.



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

Editing a Client – Scheduling

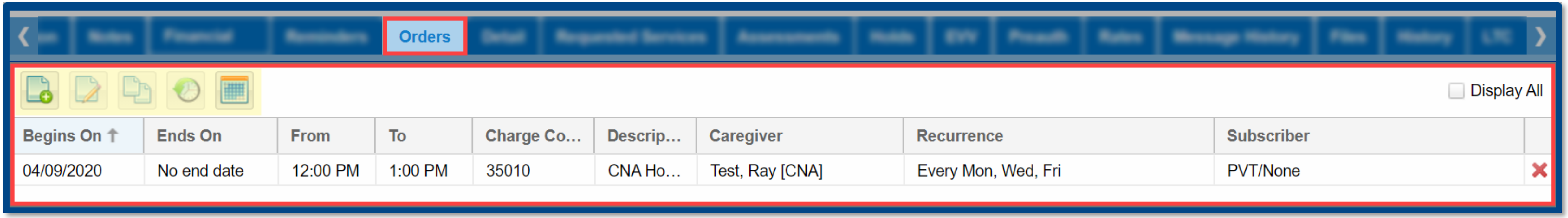
Orders Tab

The Order tab can be used by a Registry to schedule one time, or recurring, visits pertaining to a Client. You may edit existing orders here, as well. See the *Creating & Managing Visits* training for in depth instructions to create and edit visits.

Note: Before creating an Order, ensure that your Charge Codes have been set.

Common Action:

- Schedule appointments for a Client by selecting a start date, time, recurrence, and Caregiver. Make edits to the timing if necessary.



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

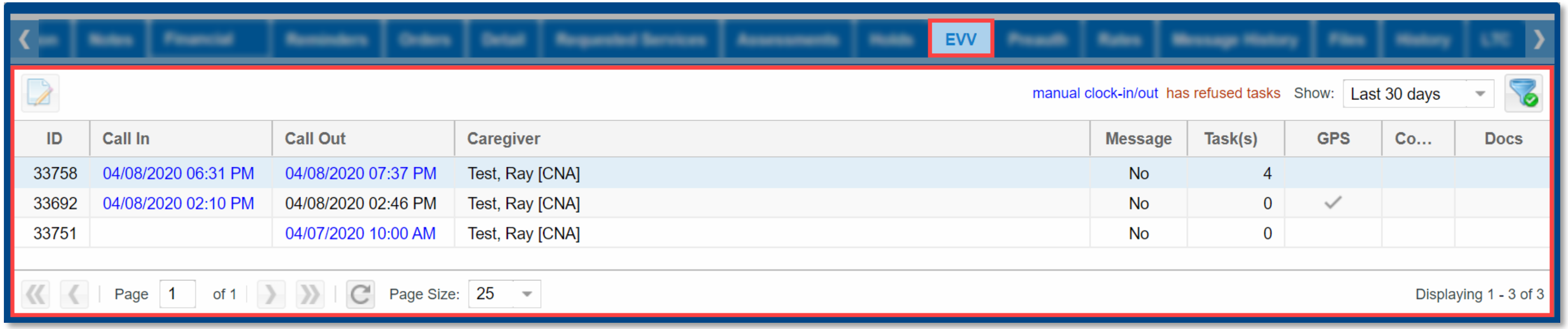
Editing a Client – Scheduling

EVV Tab

The EVV tab is used to record and edit information pertaining to a Client visit or telephony event, including details on check in / check out timing and the Caregiver that administered the event.

Common Actions:

- Update Call In and Call Out timing for a Caregiver
- Upload documents in the Edit area pertaining to a visit



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

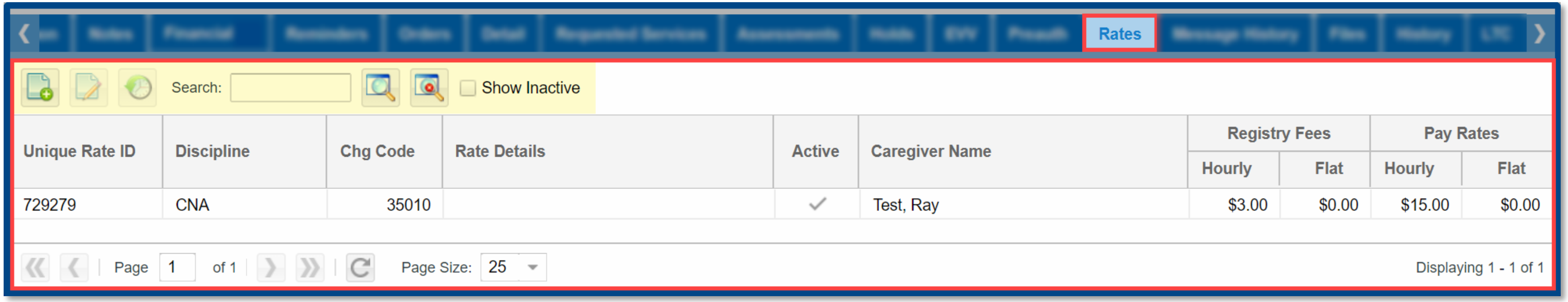
Editing a Client – Billing

Rates Tab

The Rates tab is where a Registry can store information about agreed upon payment amounts that a Client will pay to a Caregiver and Registry for specific services. This tab can be used to create and edit unique Rate ID's that will be used for each Client - Caregiver relationship. Rates are searchable from this tab, as well. See the *RegistryConnect Foundations* training for more information about Rate IDs.

Common Action:

- Add additional Rate ID's when new caregivers provide services or existing caregiver provide new services to the client.

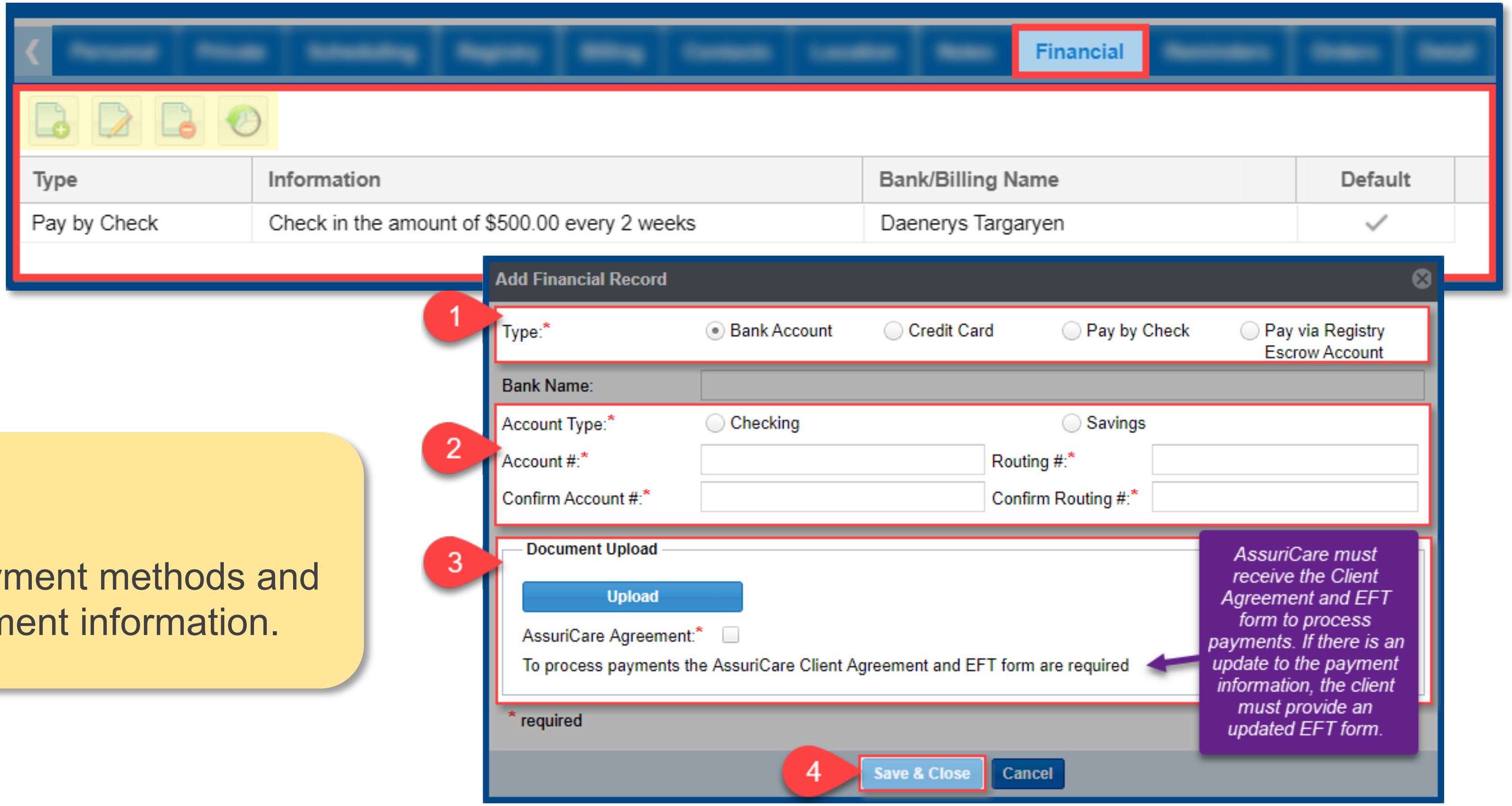


To learn how to set up the dropdown options for client tab fields, see the RegistryConnect Configuration training

Editing a Client – Billing

Financial Tab

The Financial tab can be used by Registries utilizing AssuriCare's payment processing system and can be used to make changes to Client payment methods.



Common Action:

- Delete unwanted or expired payment methods and replace them with updated payment information.

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

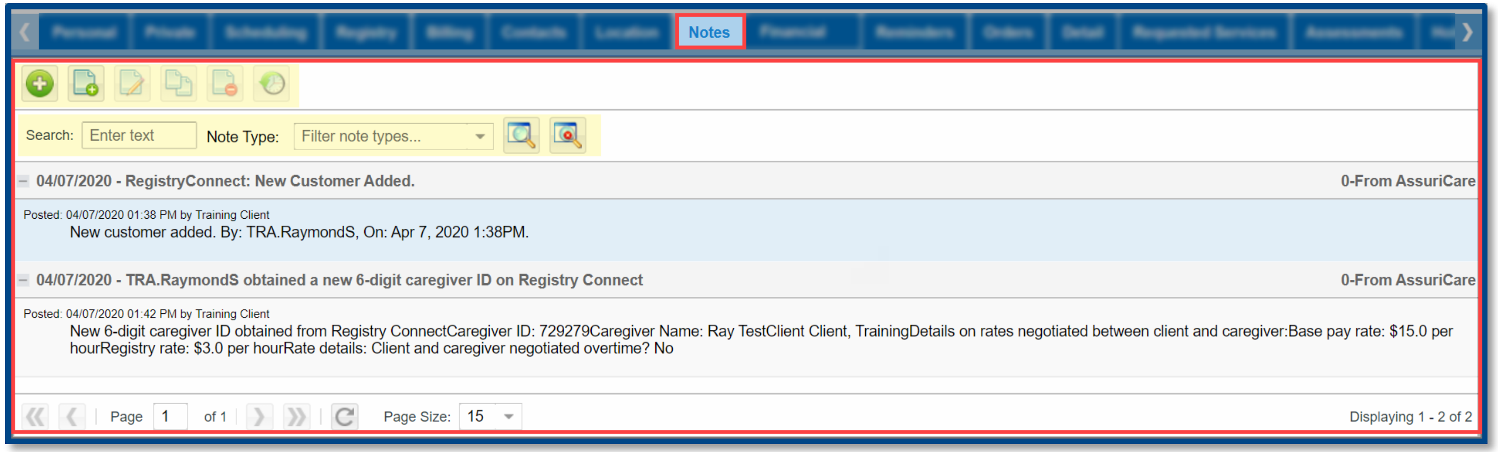
Editing a Client – Records

Notes Tab

The Notes tab provides an area to document changes and observations pertaining to a Client's account. New notes can be added at any time and can be sent to AssuriCare, and notes from AssuriCare will appear here. This area is searchable via the search field beneath the options. See the *RegistryConnect Configuration* training for more information on setting up notes.

Common Action:

- Document common Client account updates, such as insurance information changes, Caregiver switches, and updated payment information.



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

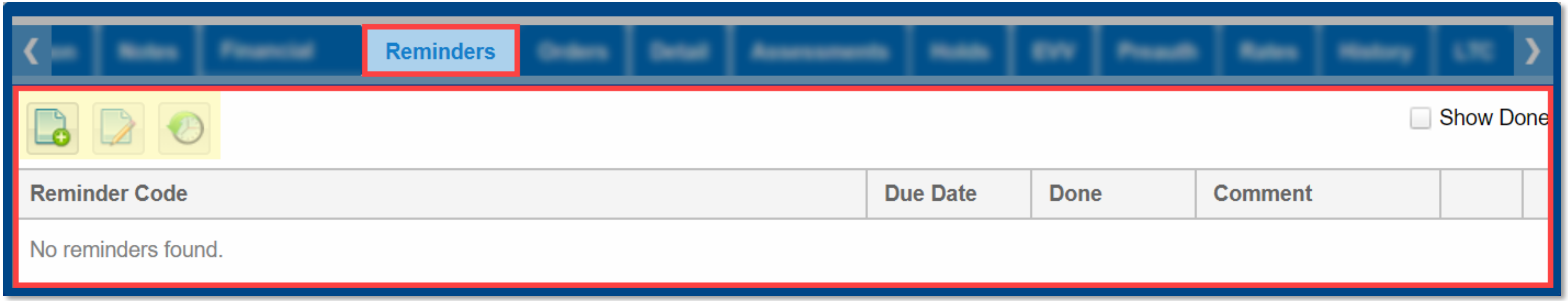
Editing a Client – Records

Reminders Tab

The Reminders tab can be used to log and edit reminders for a Client's case. Reminder selection options for this tab are set in the Registry Client Settings area. See the *RegistryConnect Configuration* training for more information on setting up reminder types.

Common Action:

- Reminders are Commonly used for simple tasks such as weekly status updates and birthdays.



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

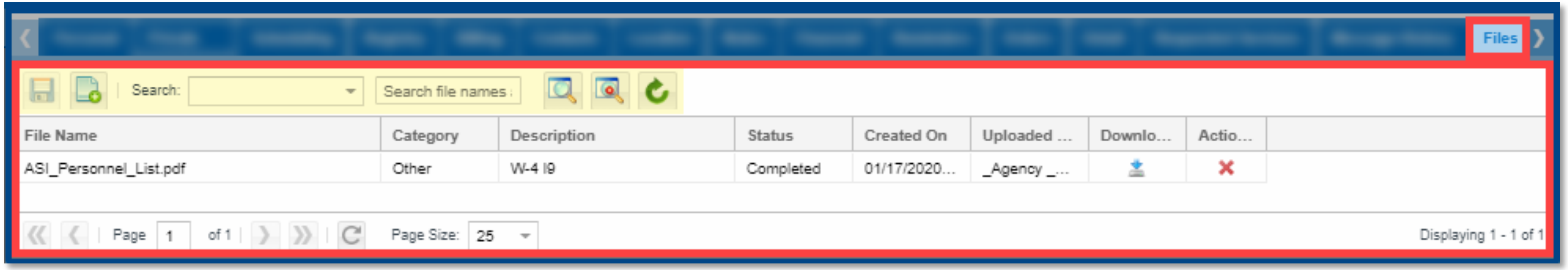
Editing a Client – Records

Files Tab

The Files tab is where a Registry can upload and store required files for a Client's case. 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.

Common Action:

- Upload time sheets or new policy agreements
- Files with the "To AssuriCare" checkbox toggled will be sent to AssuriCare



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

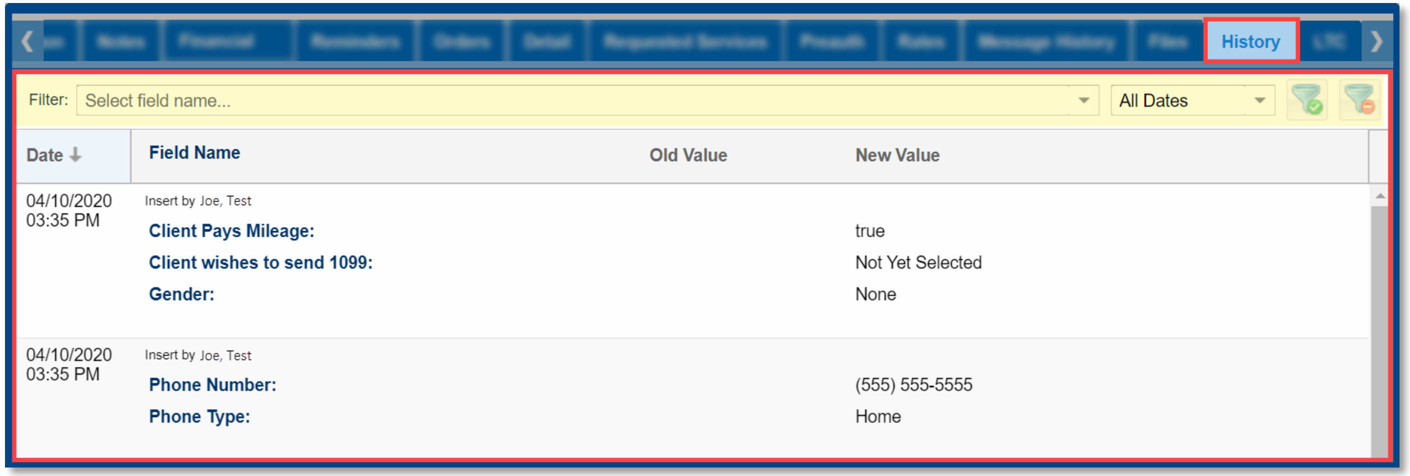
Editing a Client – Records

History Tab

The History tab serves as an audit log for the Client's case. This serves as a running record for any changes that have been made by the Registry, and any alterations to a Client's record will create a new entry in the History tab. These entries can be filtered for easier lookup and cannot be edited.

Common Action:

- View log entries to review when payment information was updated.



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RegistryConnect Training

Creating & Managing Visits

Creating & Managing Visits

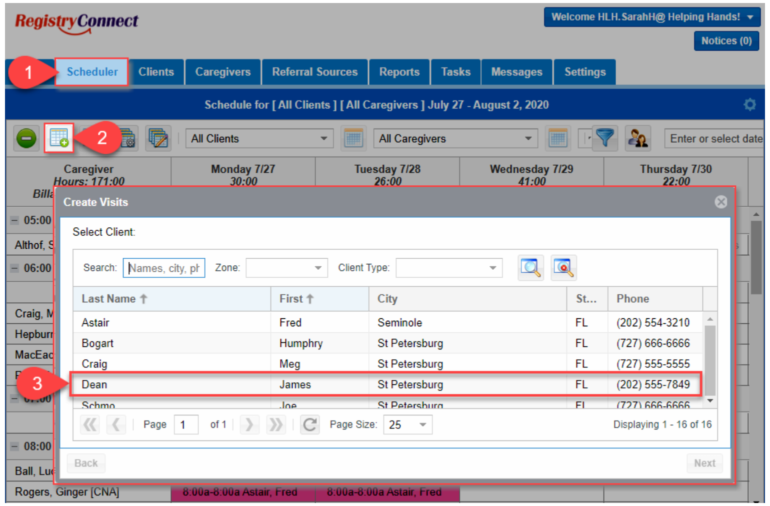
The slides in this presentation will show how to create and edit visits for clients, as well as how to find available caregivers and use the Scheduler.

To learn how to set up schedule defaults, see the RegistryConnect Configuration training. For instructions on charge codes, see the RegistryConnect Foundations training.

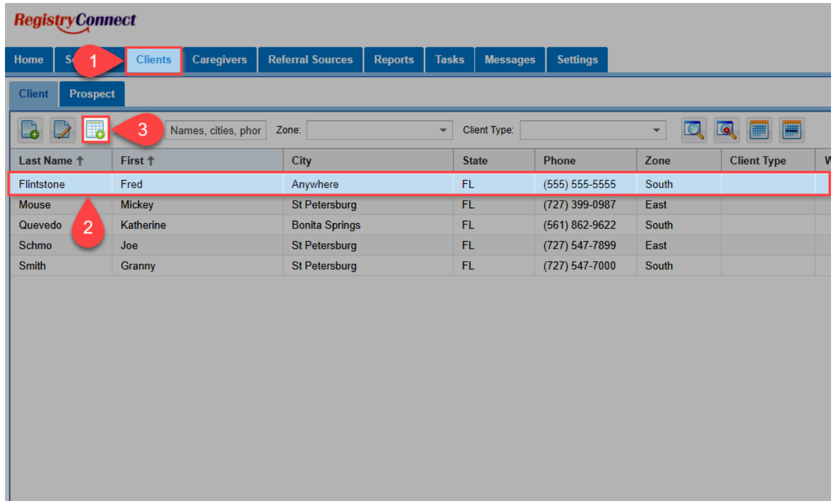
Creating Client Visits

Registries can set up client visits three different ways:

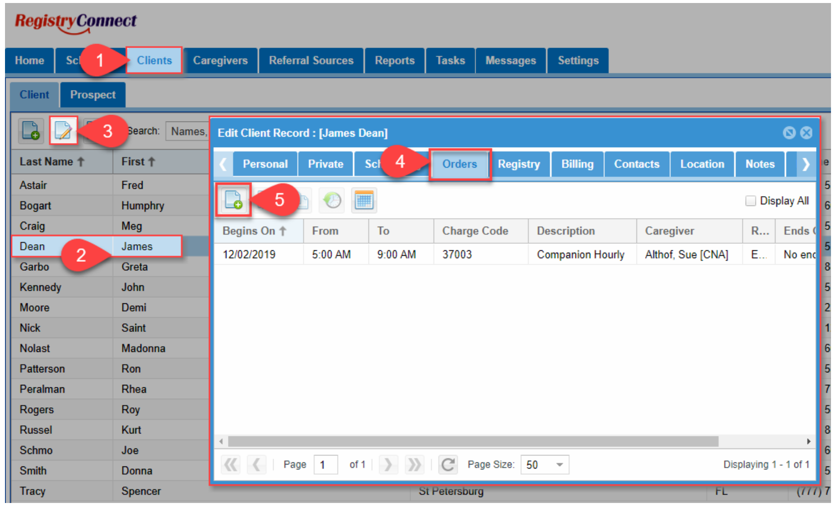
Via the Scheduler



Via the Clients tab

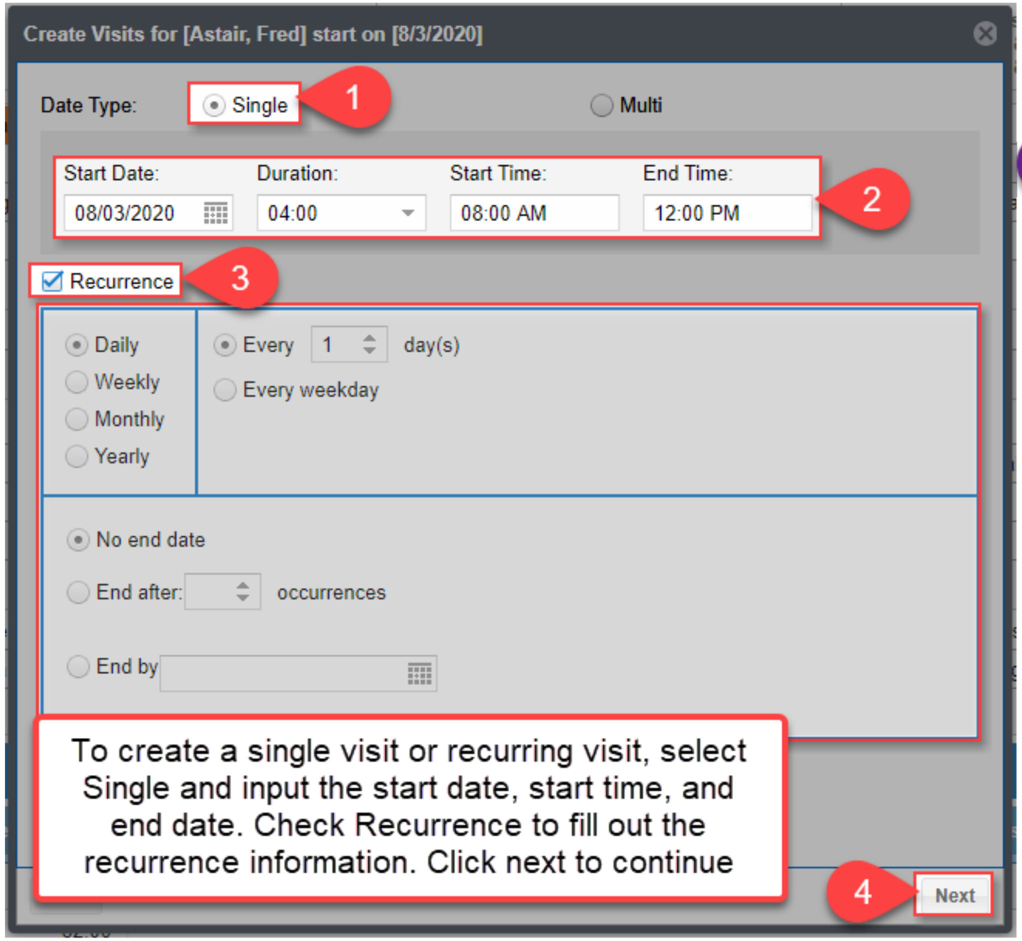


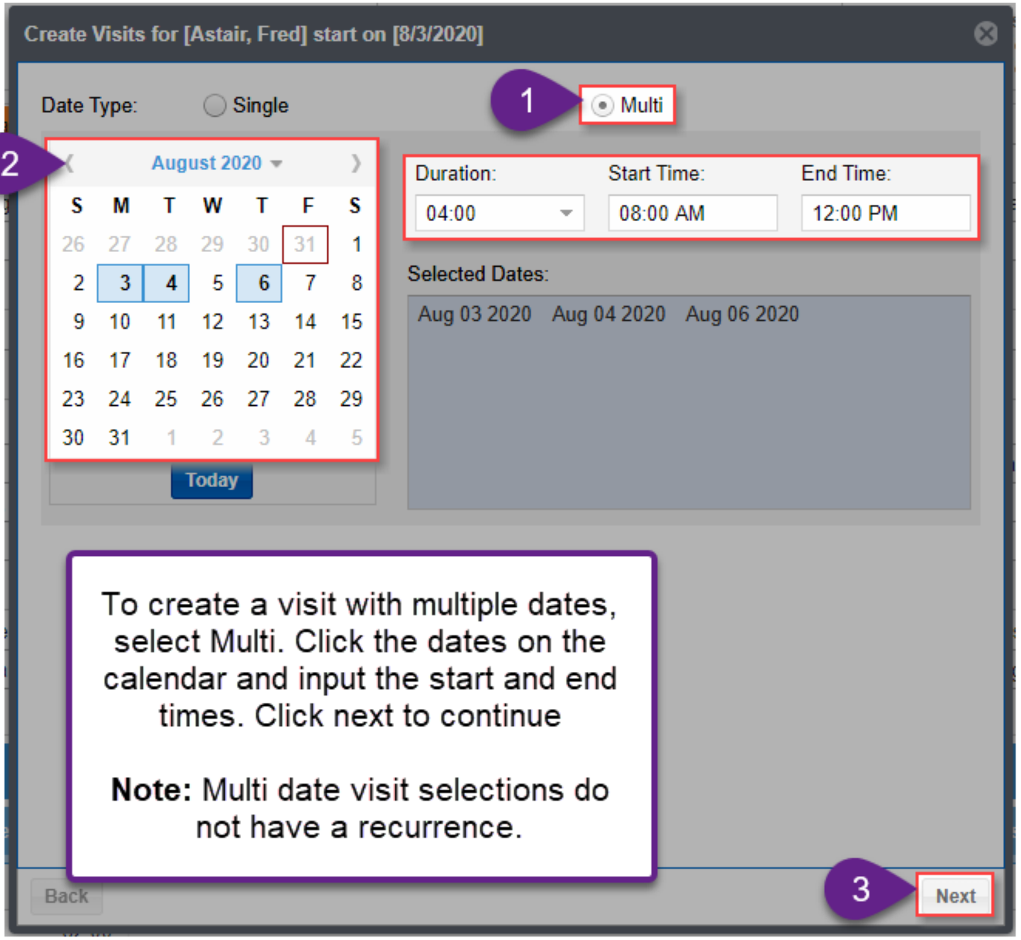
Via the Orders tab in the Client Record



Creating Client Visits

Indicate the date type and complete the date, start time, and end time fields





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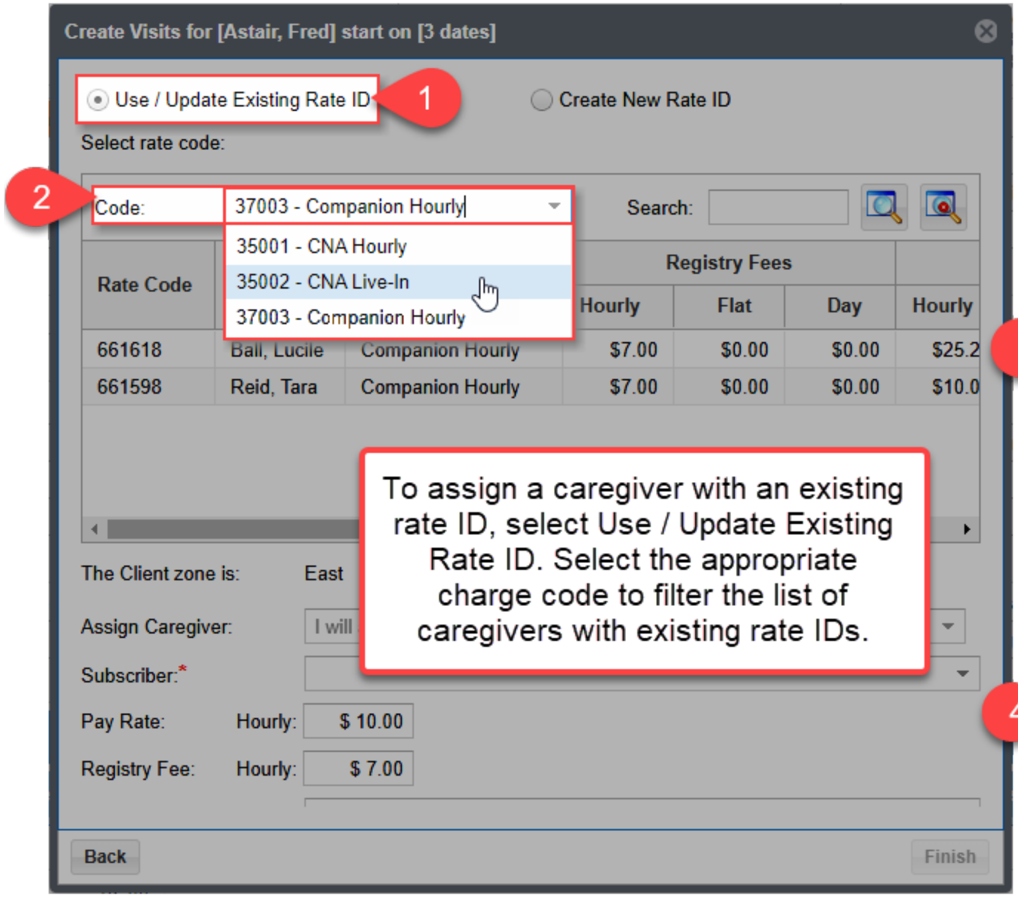
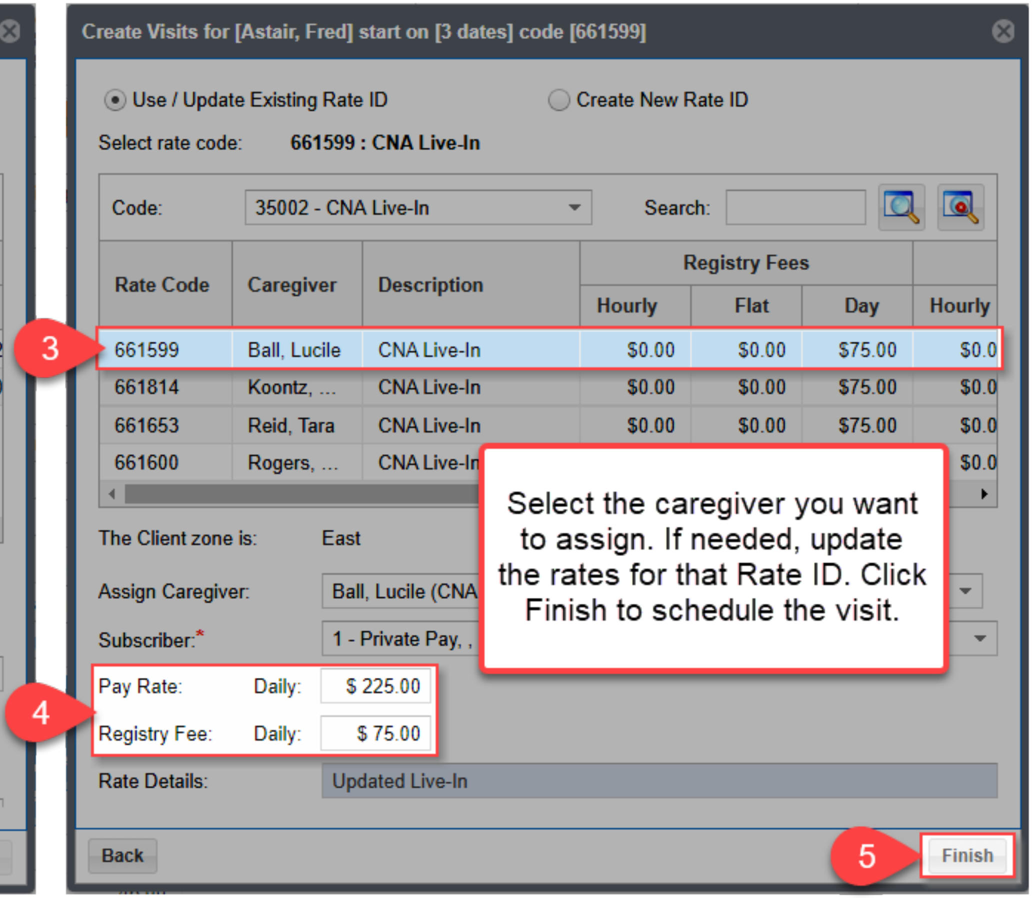
Creating Client Visits

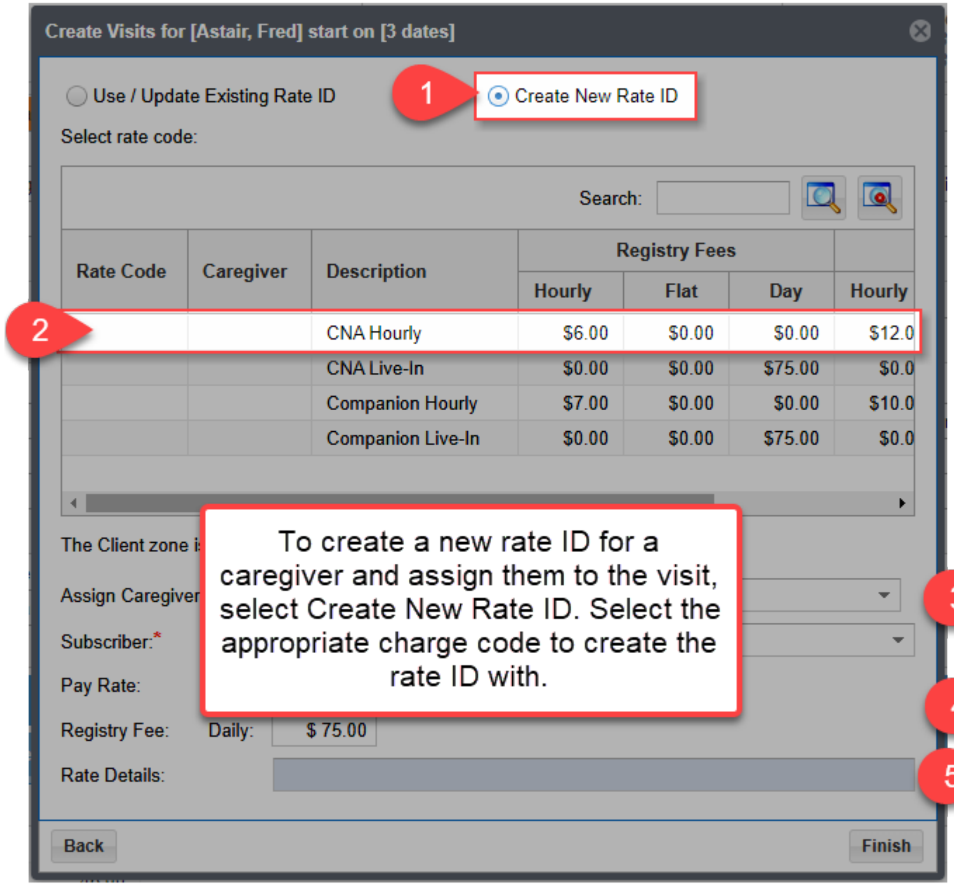
To assign a caregiver to the visit that already has a rate ID for that client, select Use / Update Existing Rate ID. Select the appropriate charge code and then select the caregiver. Update the rates if needed and click Finish.

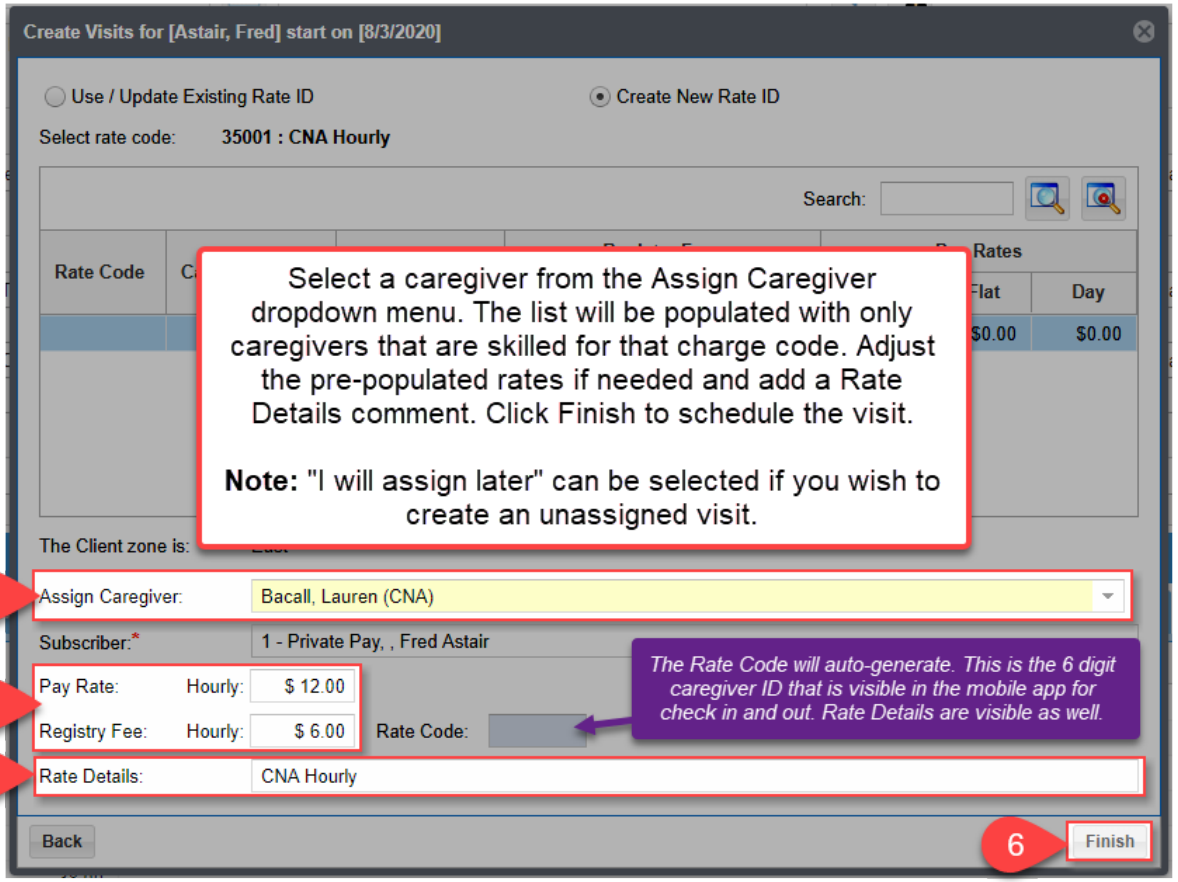




Creating Client Visits

To assign a caregiver without an existing rate ID, select Create New Rate ID. Select the appropriate charge code and then select the caregiver. Update the rates if needed, enter a Rate Details comment and click Finish.



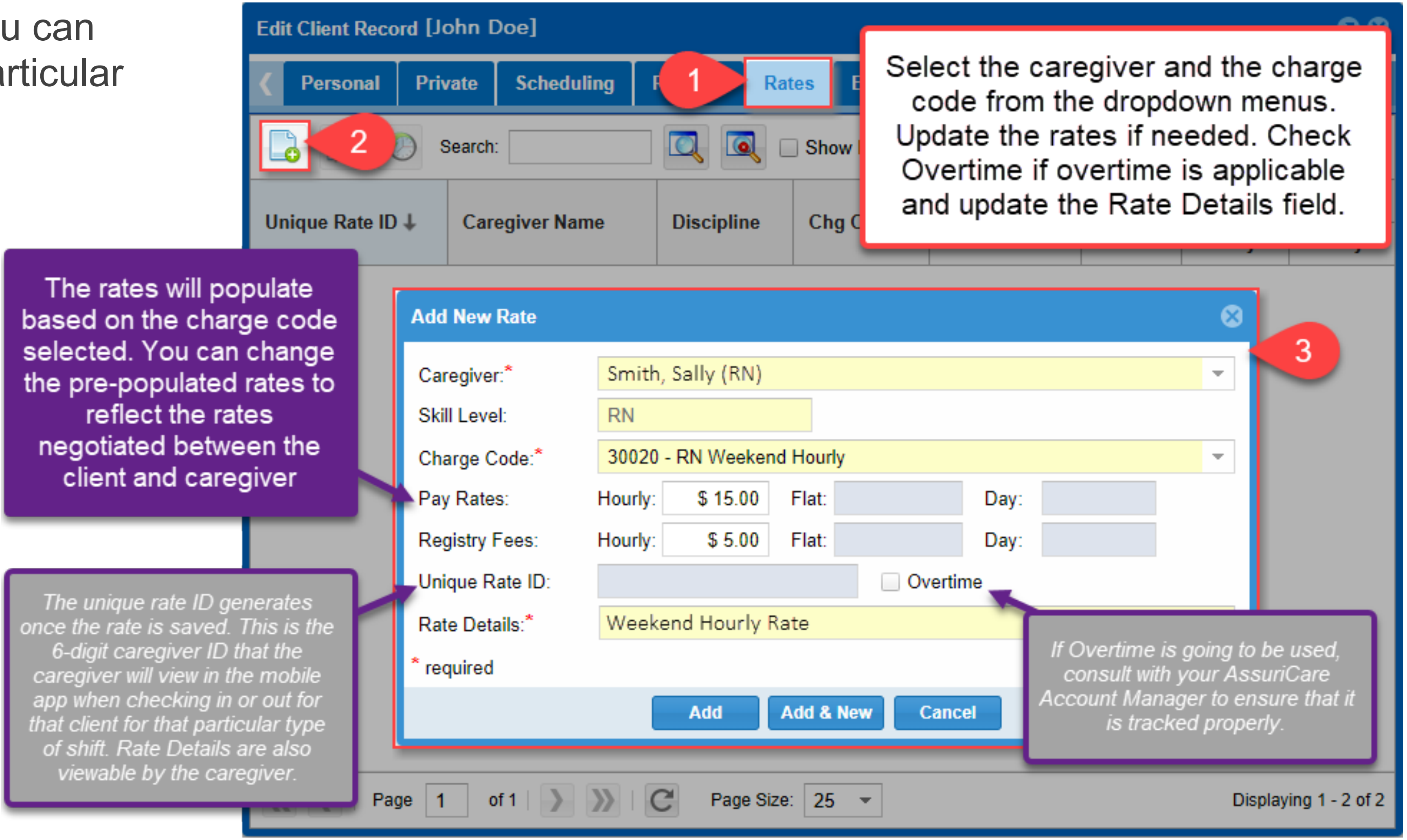


Creating Rate IDs for Each Client-Caregiver Relationship

To make scheduling easier, you can create a Rate ID between a particular caregiver and client before scheduling.

The rate is created on the Rates tab in the client record. The unique rate ID that is generated is what the caregiver will use in the mobile app to check in and out for that client.

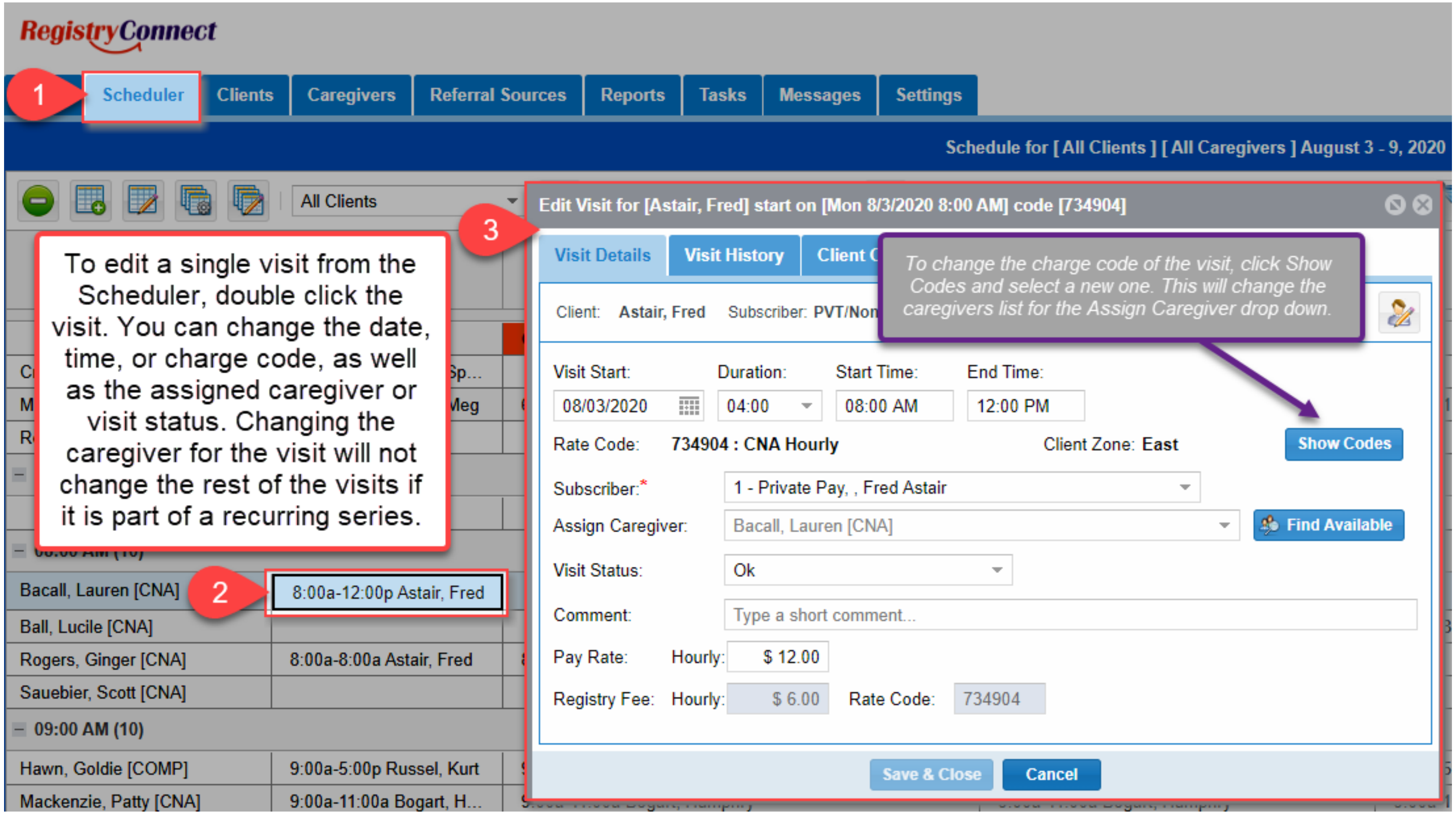
Note that if the caregiver performs services at different rates for the same client, a rate ID will need to be created for each service with the correct charge code.



Edit Client Visits

Once a visit is created, it can be edited from the Scheduler tab. The scheduler can edit:

- Visit date
- Start / End time
- Assigned Charge Code
- Assigned Caregiver
- Visit Status
- Visit Comment



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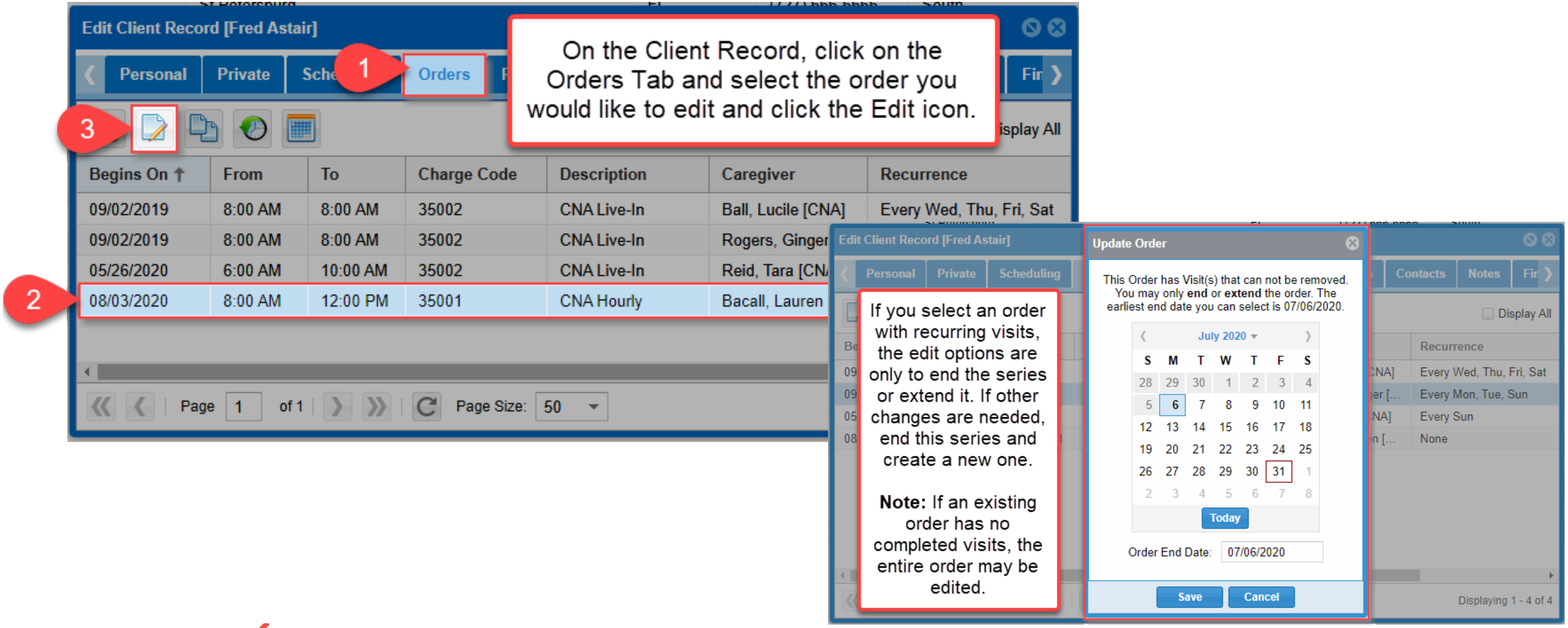
Edit Client Visits

You can also edit a visit from the Orders tab of the Client record.



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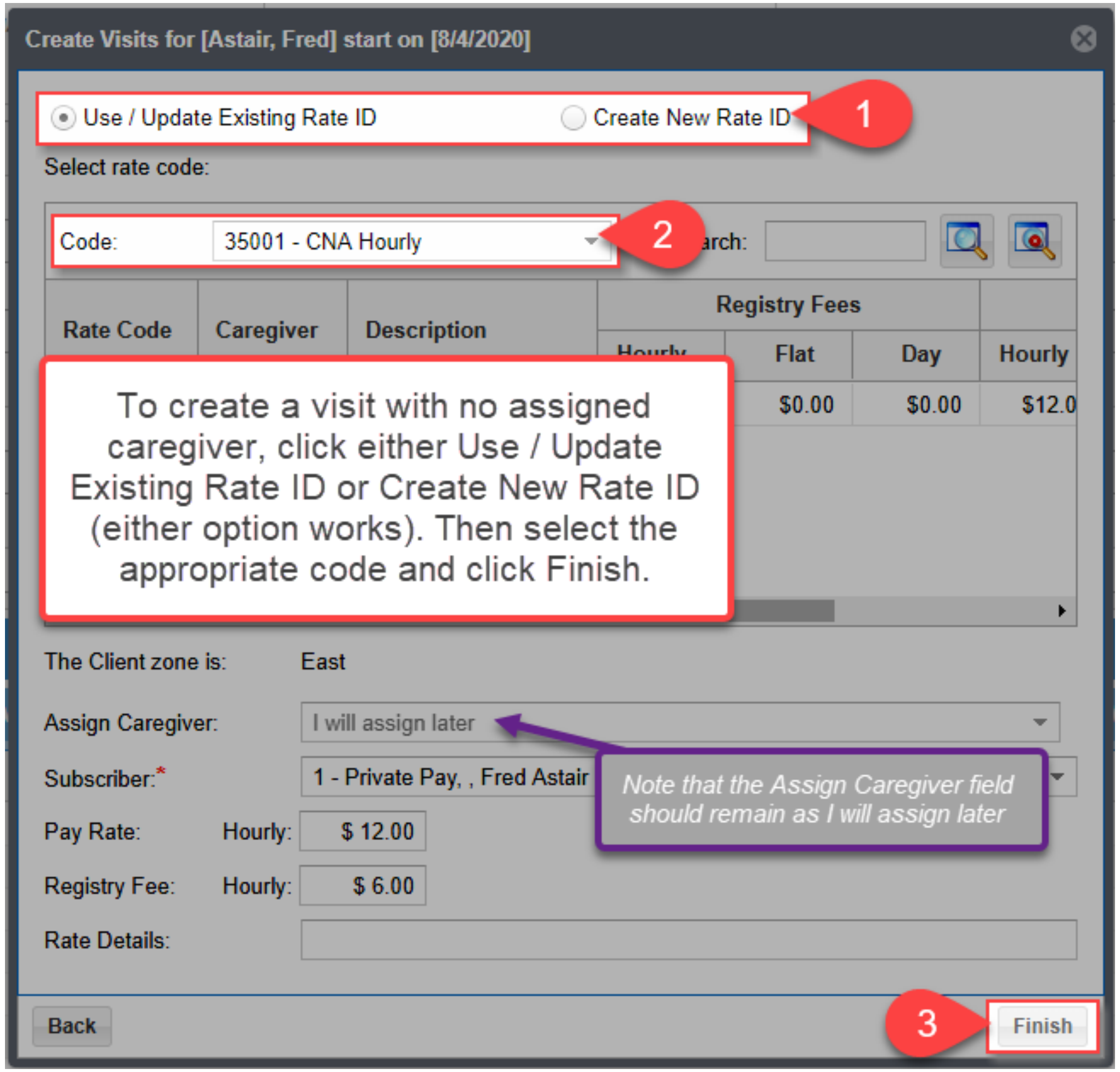
Create a Visit with No Assigned Caregiver

If you do not know which caregiver will be assigned to the visit, you can create a visit without assigning a caregiver.

To do so, start a new visit and click either Use / Update Existing Rate ID or Create New Rate ID (either option works). Then select the appropriate code and click Finish.



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Assign Caregiver to Unassigned Visit

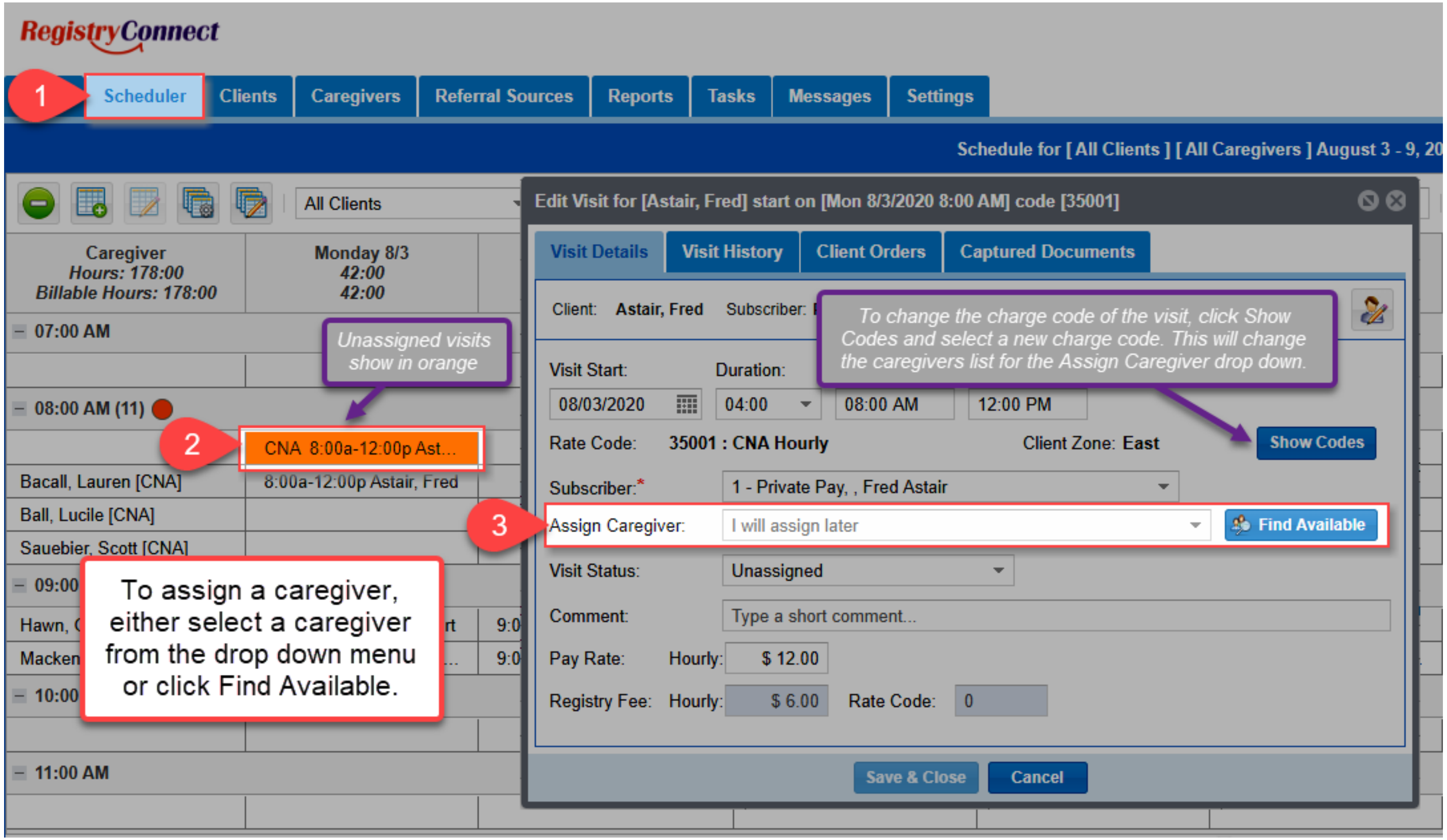
To assign a caregiver, double click into the unassigned visit. To assign either:

- Select the caregiver you would like to assign

  OR

- Click Find Available

If an on-going order was created without an assigned caregiver, be sure to open the order on the Client tab to assign the caregiver to the entire order, rather than the individual visit from the scheduler.



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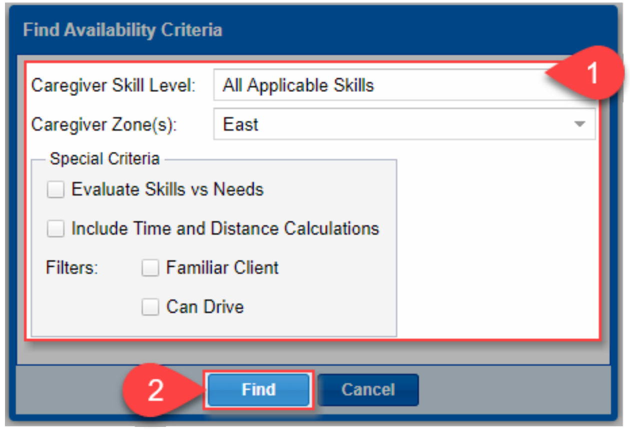
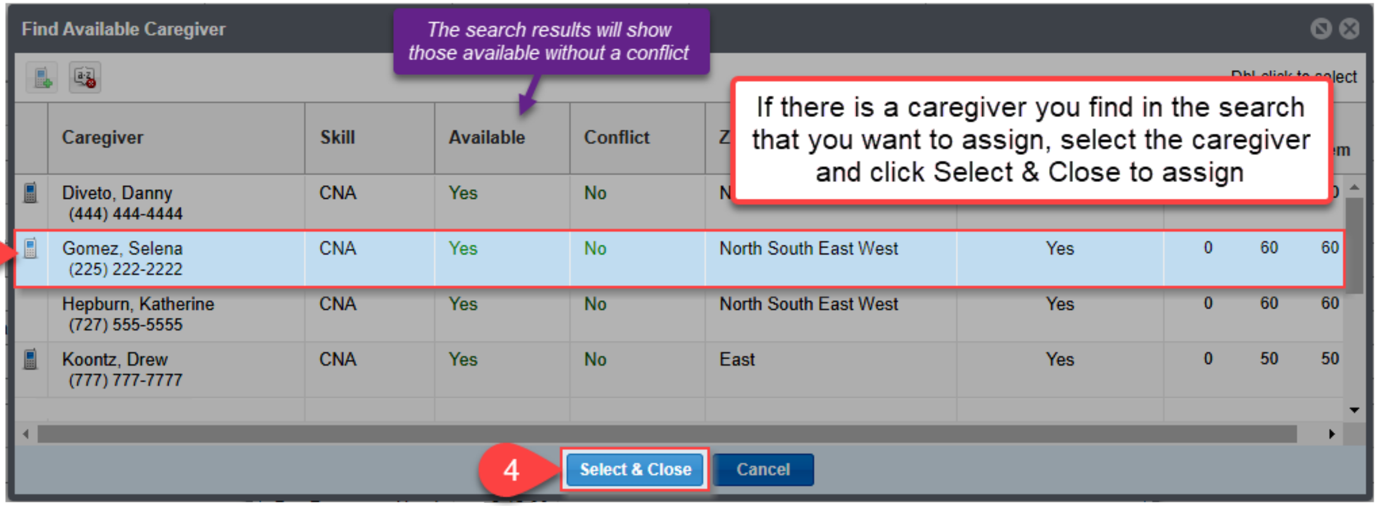
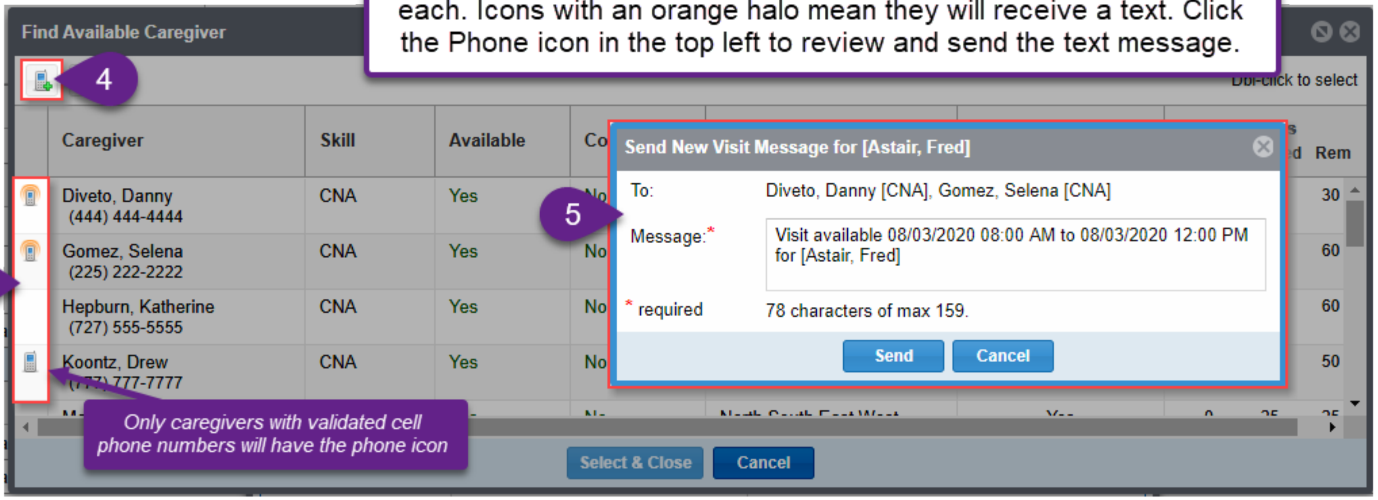
Find Available Caregivers

Using the Find Available function, you can either directly select an available caregiver or tap the phone icons beside each caregiver you would like to notify about the open visit to take.

To find available caregivers, first select the criteria to search. You can limit by skill level and zone and choose to account for skills v. needs, etc.







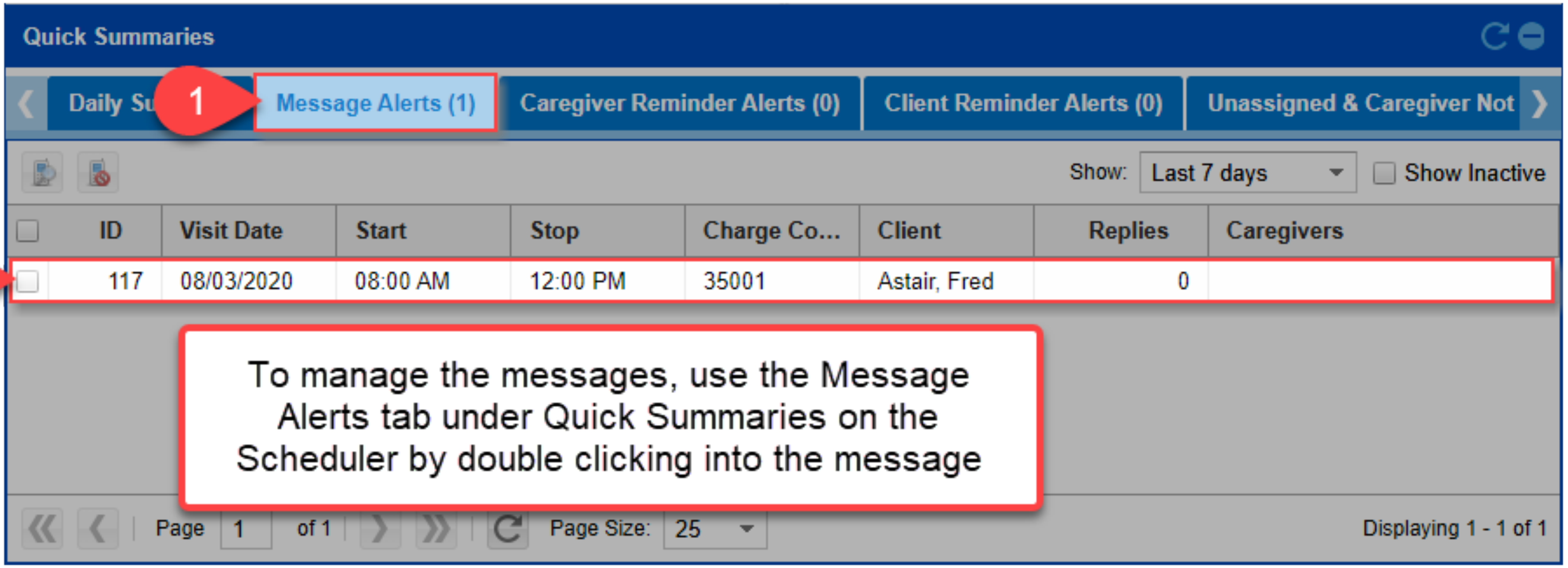
In addition to seeing the skill, availability, and zone for the caregiver, you can see:

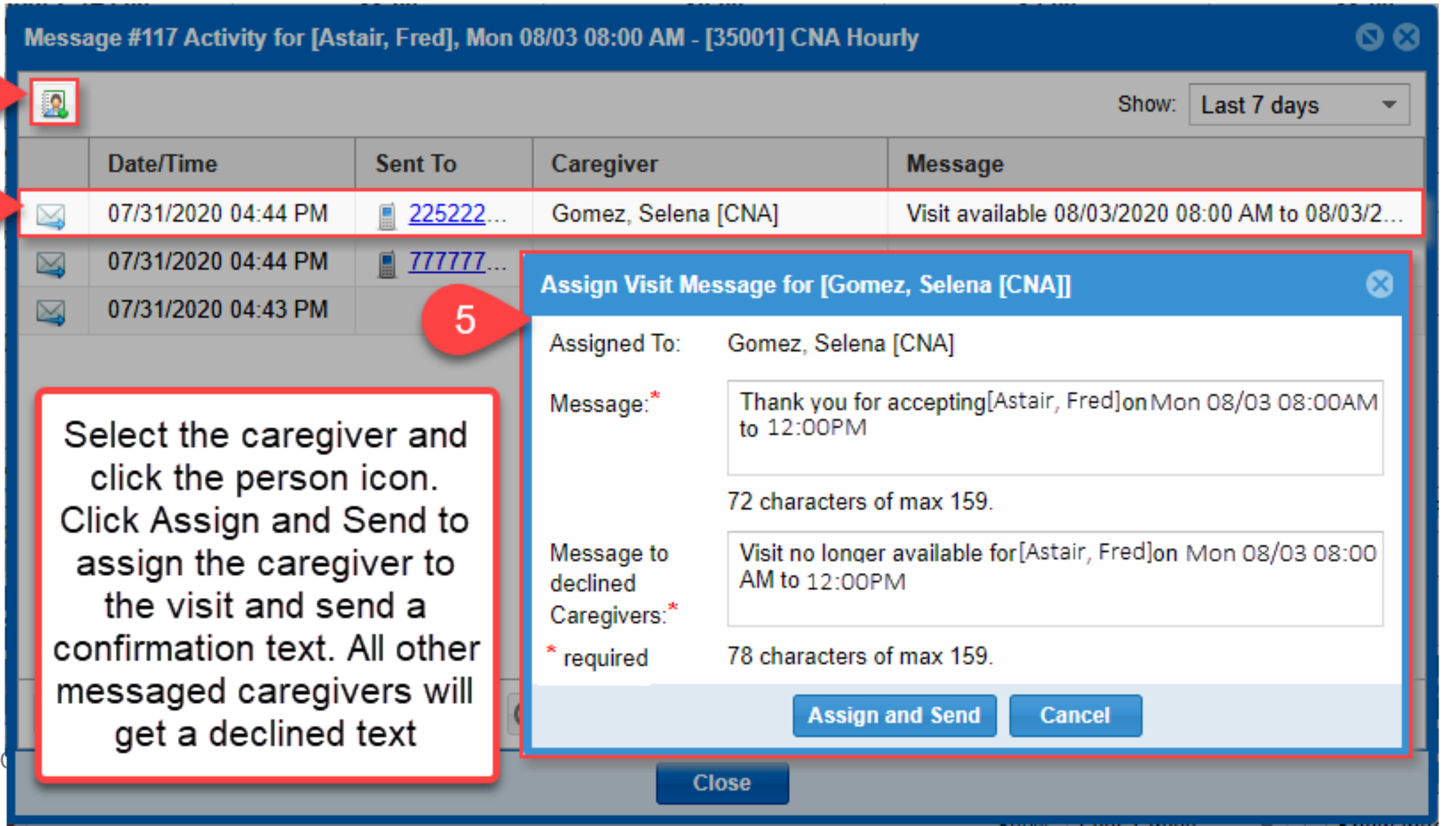
- Distance – indicates the distance a Caregiver will have to travel (either from their home address or the previous visit).
- Time – indicates when the previous visit ends, if there is another one that day.

Manage Caregiver Visit Messages

You can manage messages under the Message Alerts tab in Quick Summaries on the Scheduler.

Once you have received a response from a caregiver who would like to take the visit, you can assign directly from the messages.





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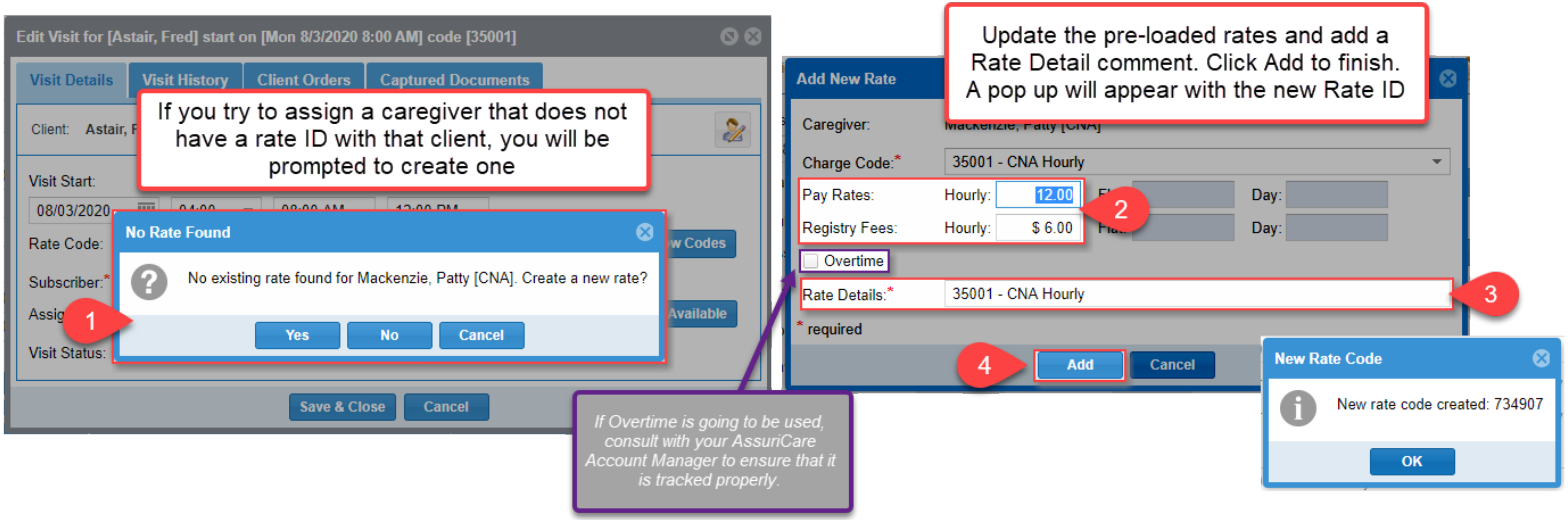
No Existing Rate Pop Up

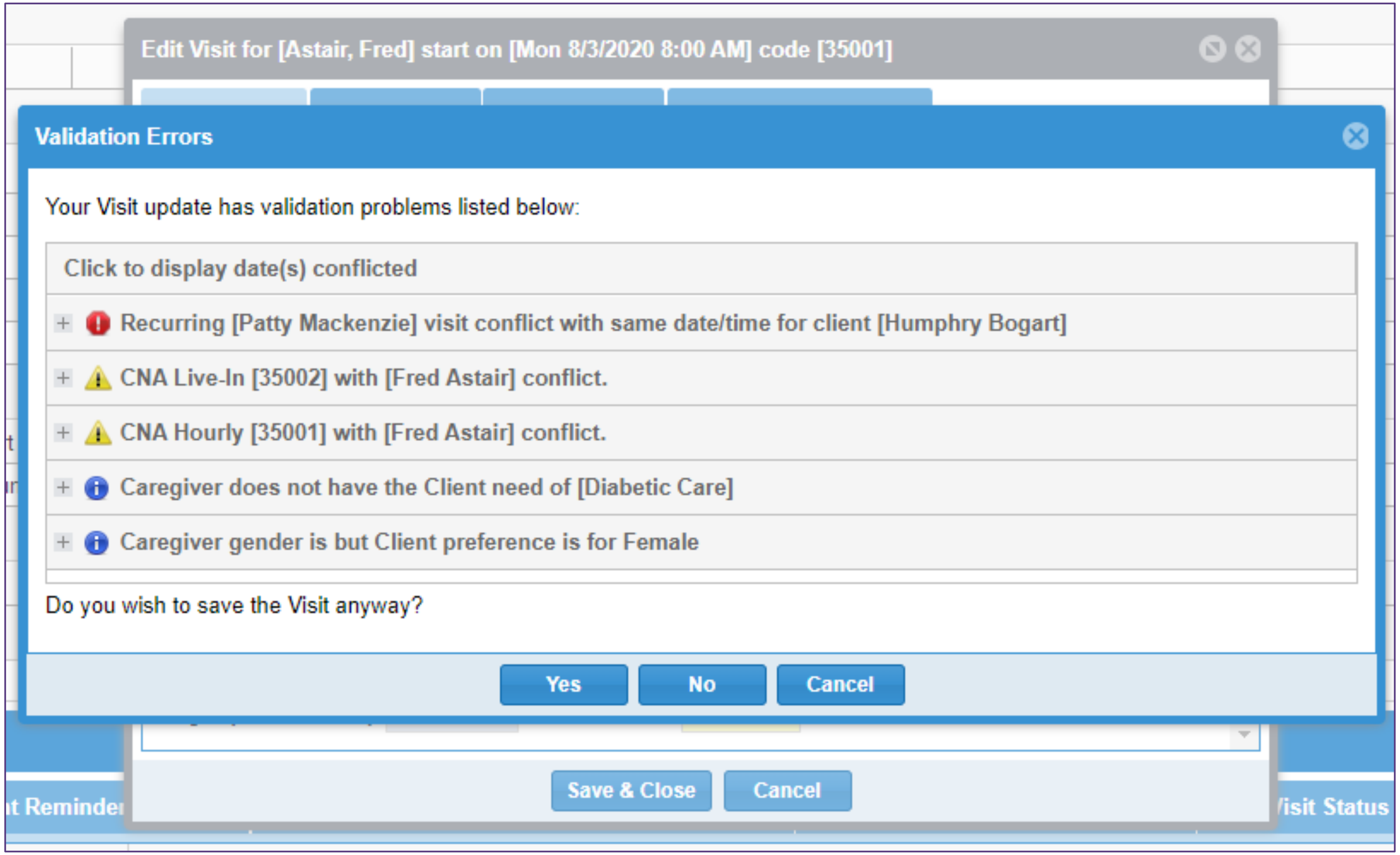
Note that at any point you try to create a visit with a caregiver who does not have a Rate ID with that client, RegistryConnect will prompt you to create one. Once you have created a rate, it will be visible to the Caregivers in the mobile app.



Visit Validation Errors

Whenever you save a visit, any applicable validation errors will pop up for you to either return and fix or to accept. Some validation errors include:

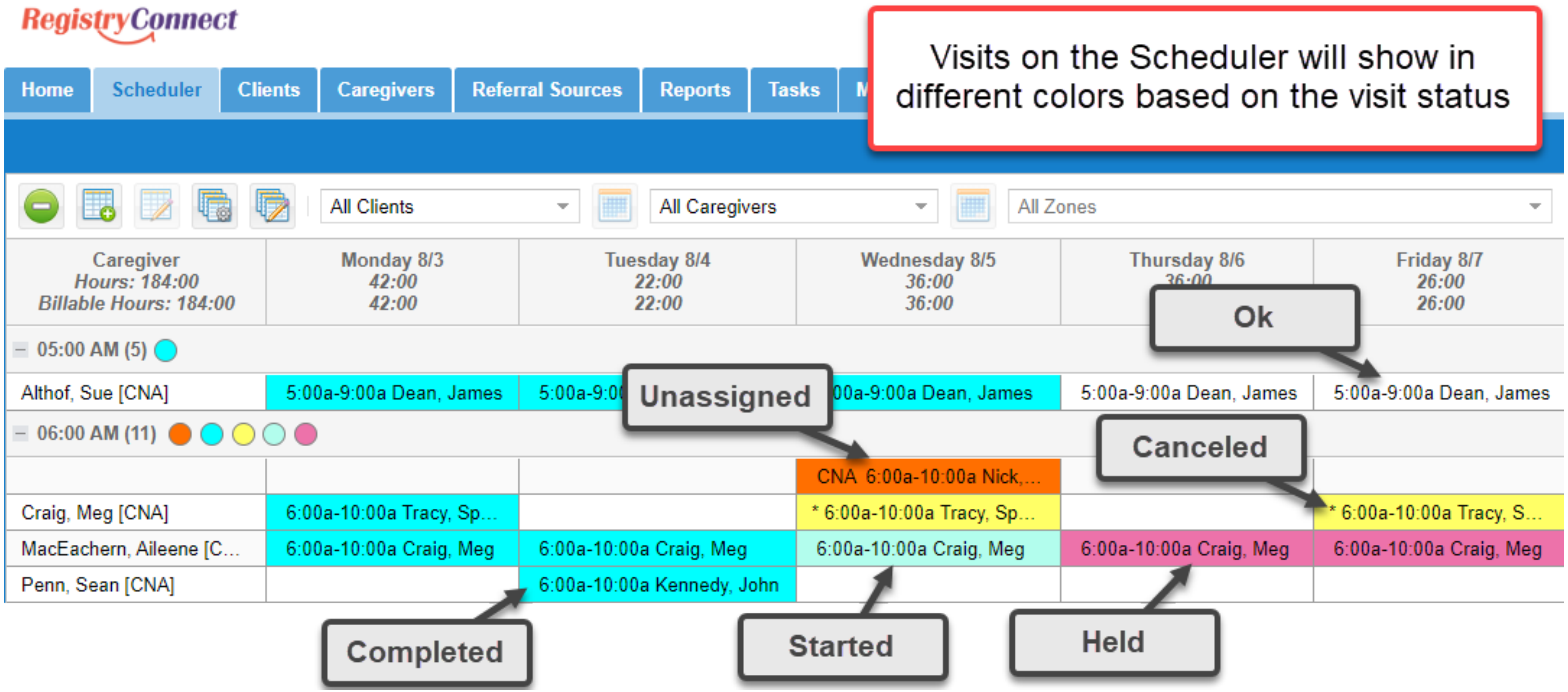
- Overlapping visits between different caregivers for the same client
- Multiple visits assigned to the same caregiver at that time
- Skills v. Needs mismatches
- Preference mismatches



AssuriCare

A Note about Visit Status

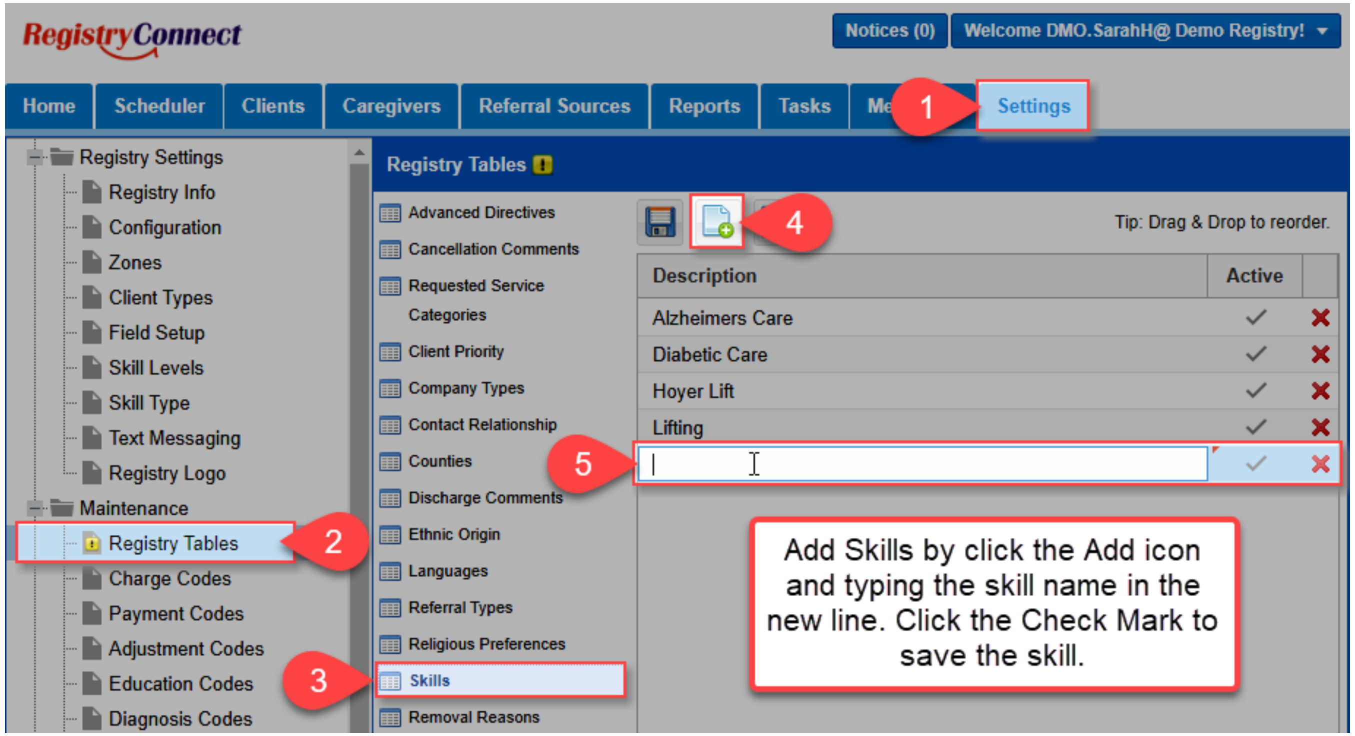
The Scheduler will show all scheduled visits within a given week. Each visit will show in a different color depending on the visit status. A Green indicator shows that payment has been processed.

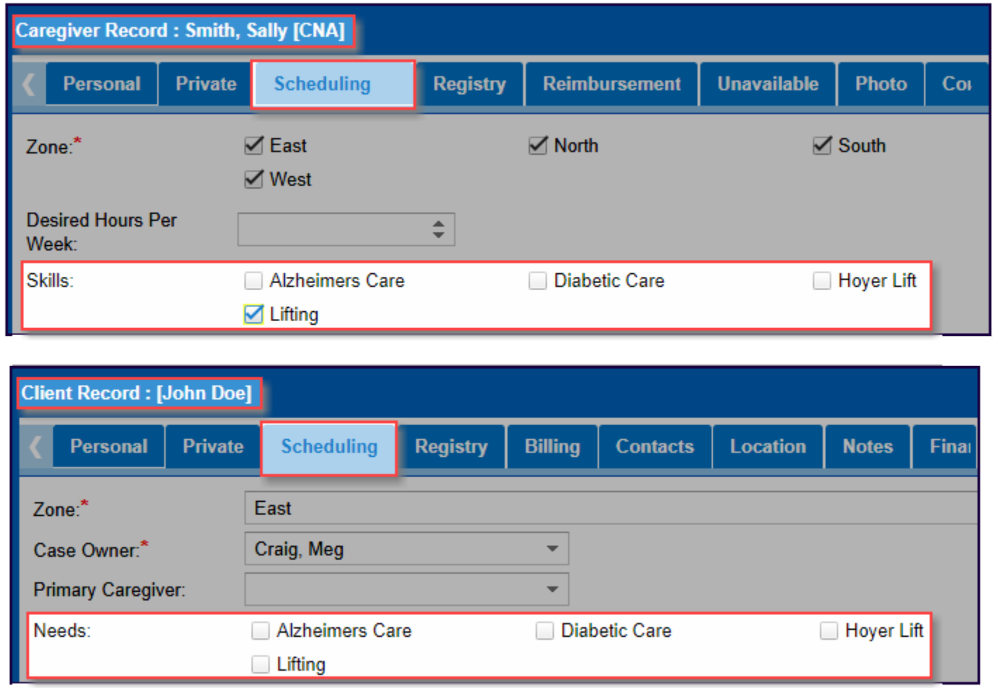


Appendix

A Note about “Skills”

Registries also have the option to use *Skills*, which are set up within the Registry Tables. These *Skills* are used to list specific abilities that caregivers may have. These skills will also show up on client records as *Needs*. Registries can use this information to further aid in ensuring that properly skilled caregivers are scheduled.





“Skills” and “Needs” as shown on the Scheduling tabs of the Caregiver and Client records

Enable Skills vs. Needs Conflicts

You can enable warnings for when there is a mismatch between the caregiver's skills and the client's needs.