



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.

RegistryConnect Notices (0) Welcome tra.raymonds@ Training Registry! Friday, April 10, 2020, 3:28:33 PM

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

Client Prospect

Search: Names, cities, phor Zone: Client Type: Show Inactive

| Last Name ↑ | First ↑ | City | State | Phone | Zone | Client Type | Web Access | Active | Last Completed Visit |
|-------------|----------|--------|-------|----------------|------|-------------|------------|--------|----------------------|
| Client | Training | Natick | MA | (444) 444-4444 | East | | | ✓ | 04/08/2020 03:31 PM |
| Smith | Joe | Boston | MA | (555) 555-5555 | East | | | ✓ | 04/09/2020 11:10 AM |



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

AssuriCare Proprietary and Confidential

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.

The screenshot displays the 'Create Client' interface with the 'Personal' tab selected. The form includes fields for Client ID, First Name, Middle, Last, Suffix, Address, City, State, and Postal Code. A red star is placed over the 'Address Validation' button. A callout box explains that clicking this button will verify the address and turn green if no changes are needed. Below the form, the 'Phones' section is visible, showing a table with columns for 'Prior...' and 'Name'. A red star is placed over the 'Add New Phone' button. A dialog box titled 'Add New Phone' is open, showing fields for 'Phone' (with area code, exchange, and number) and 'Memo'. The 'Add' button is highlighted.

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.

At least 1 phone number required

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

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.

Create Client

Personal **Private** 1 Scheduling Registry 2

Social Security:* 111-11-1111 2

Referring Doctor: [Dropdown]

Birth Date: 01/01/1981 Age: 39 3

Gender:* Male Female Not Specified

Ethnic Origin: [Dropdown]

Language: [Dropdown]

Marital Status: Single Married

Height: 6-1

Weight: 200

Occupation: [Text Field]

Religious Preference: [Dropdown]

Employment Status: [Dropdown]

Advanced Directives: DNR Full Code Living Will
 Medical Power of Attorney Power of Attorney

Medicaid ID: [Text Field]

* required 🔒 read only

4 Optional Fields - Editable at a later time



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).

Create Client

Personal Private **Scheduling** Registry

Zone:* East

Case Owner:* Soulard, Raymond

Primary Caregiver:

Needs: Alzheimers Care Diabetic Care Hoyer Lift Lifting

Gender Preference: Female Male No Preference

Familial/Do Not Send:

Familial Caregivers ↑

No Caregiver selected. Click Add button.

0 items

Don't Send Caregivers **Comment**

No Caregiver selected. Click Add button.

0 items

Scheduling Comment:

* required 📄 read only

Optional Fields - Editable at a later time

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, LTCL, 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.

Diagnoses can be entered in manually or loaded from ICD-10 codes. Codes can be added via the Registry Settings tab. These codes will comprise the primary diagnoses for the Client.

Check "Allow Flexible Scheduling" to allow unscheduled visits

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

Edit Client Record [Mary Smith]

Personal Private Scheduling Orders **Registry** Billing Location Contact

Client Type: [Dropdown]
Admit Date: 08/12/2019 Service Period: [Dropdown]
Discharge Date: 09/13/2019
Discharge Comment: Condition Improved

Diagnosis [Add] [Edit] Tip: dbl-click line item to edit Diagnosis. Drag & Drop to reorder.

| Priority | Code | Description |
|---------------------|------|-------------|
| No diagnoses found. | | |

Client Priority Code: [Text]
Billing ID: 283003

Save Save & Close Cancel

Select the discharge date and comment. Once saved, the client will be marked inactive

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

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

1 Clients 2 Prospect 3 Jenkins 4 Edit icon 5 History tab 6 Convert to Client

Edit Client Prospect Record [William Jenkins]

Client ID: 23 [Auto]

First Name: * William Middle: Last: Jenkins Suffix: Credentials:

Address:

Address 2:

City: St. Pete State/Pr: Florida Postal Code: Postal Code: *

County: Personal Em*

Phones Tip: dbl-click line its

| Prior... | Name | Number | Memo |
|----------|-------|----------------|------------------|
| 1 | Other | (555) 234-5678 | Daughter's phone |

Referral Source: Johnnie Carson Referral Date: 12/17/2019

Initial Contact: Contact Date:

Home Visit Conducted By: Conducted Date:

* required read only

Convert to Client Save Save & Close Cancel

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



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.

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Client Prospect

Search: Names, cities, phor Zone: Client Type: Show Inactive

| Last Name ↑ | First ↑ | City | State | Phone | Zone | Client Type | Web Access | Active | Last Completed Visit | |
|-------------|----------|--------|-------|----------------|------|-------------|------------|--------|----------------------|--|
| Client | Training | Natick | MA | (444) 444-4444 | East | | | ✓ | 04/08/2020 03:31 PM | |
| Smith | Joe | Boston | MA | (555) 555-5555 | East | | | ✓ | 04/09/2020 11:10 AM | |

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

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.



Client ID:* 1 [Auto] Active

First Name:* Training Middle: Last:* Client Suffix: Credentials:

Address:* 778 Lime St.

Address 2:

City:* Natick State/Pr:* Massachusetts Postal Code:* 85225

County: Personal Email:

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

| Prior... | Name | Number | Memo |
|----------|------|----------------|------|
| 1 | Home | (444) 444-4444 | |

Referral Source: Referral Date:

Initial Contact: Contact Date:

Home Visit Conducted By: Conducted Date:

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

The screenshot shows the 'Private' tab selected in a client management interface. The form includes the following fields and options:

- Social Security:** Text input field containing '111-11-1111'. Marked as required (*).
- Referring Doctor:** Dropdown menu.
- Birth Date:** Text input field.
- Age:** Text input field.
- Gender:** Radio buttons for Male (selected), Female, and Not Specified. Marked as required (*).
- Ethnic Origin:** Dropdown menu.
- Language:** Dropdown menu.
- Marital Status:** Radio buttons for Single and Married.
- Height:** Text input field.
- Weight:** Text input field.
- Occupation:** Text input field.
- Religious Preference:** Dropdown menu.
- Employment Status:** Dropdown menu.
- Advanced Directives:** Checkboxes for DNR, Full Code, Living Will, Medical Power of Attorney, and Power of Attorney.
- Medicaid ID:** Text input field.

Legend: * required, 🔒 read only

Editing a Client – Editing Information



Registry Tab

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

The screenshot shows the 'Registry' tab interface for editing a client. The 'Client Type' is set to 'Medicaid'. The 'Admit Date' is 09/01/2019. The 'Discharge Date' and 'Discharge Reason' fields are empty. The 'Discharge Comment' field is also empty. Below these fields is a 'Diagnosis' section with a table that currently shows 'No diagnoses found.' The table has columns for 'Priority', 'Code', and 'Description'. Below the table are several checkboxes and text input fields: 'Client Priority Code', 'Signature Capture' (checked), 'Disable GPS Validation' (checked), 'Billing ID' (283090), 'Receive Emailed Documentation' (checked), 'Documentation Email' (it@august-systems.com), 'Web Access' (unchecked), 'Allow Flexible Scheduling' (unchecked), and 'Default Charge Code for Flexible Visits'. A legend at the bottom indicates that an asterisk (*) denotes a required field and a padlock icon denotes a read-only field.

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

| Last Name | First Name | Company | Contact Type | Address | Phones/Email Address | Comment |
|-----------|------------|---------|--------------|---------|----------------------|---------|
| | | | | | | |
| | | | | | | |
| | | | | | | |

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.

Zone:* East

Case Owner:* Soulard, Raymond

Primary Caregiver:

Needs: Alzheimers Care Diabetic Care Hoyer Lift
 Lifting

Gender Preference: Female Male No Preference

Familiar/Do Not Send: Familiar Caregivers ↑

| Don't Send Caregivers | Comment |
|--|---------|
| <input checked="" type="checkbox"/> | |
| <input checked="" type="checkbox"/> | |
| No Caregiver selected. Click Add button. | |
| 0 items | |

Scheduling Comment:

Caregivers will appear under the "Familiar Caregivers" once they have visits scheduled with a client.

In the event of a bad experience, Caregivers may be dragged from "Familiar Caregivers" down to the "Don't Send Caregivers".

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.

| Begins On ↑ | Ends On | From | To | Charge Co... | Descrip... | Caregiver | Recurrence | Subscriber | |
|-------------|-------------|----------|---------|--------------|------------|-----------------|---------------------|------------|---|
| 04/09/2020 | No end date | 12:00 PM | 1:00 PM | 35010 | CNA Ho... | Test, Ray [CNA] | Every Mon, Wed, Fri | PVT/None | ✘ |

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

The screenshot shows the EVV tab interface with a table of visit events. The table has columns for ID, Call In, Call Out, Caregiver, Message, Task(s), GPS, Co..., and Docs. The data rows are as follows:

| ID | Call In | Call Out | Caregiver | Message | Task(s) | GPS | Co... | Docs |
|-------|---------------------|---------------------|-----------------|---------|---------|-----|-------|------|
| 33758 | 04/08/2020 06:31 PM | 04/08/2020 07:37 PM | Test, Ray [CNA] | No | 4 | | | |
| 33692 | 04/08/2020 02:10 PM | 04/08/2020 02:46 PM | Test, Ray [CNA] | No | 0 | ✓ | | |
| 33751 | | 04/07/2020 10:00 AM | Test, Ray [CNA] | No | 0 | | | |

Additional interface elements include a navigation bar with the 'EVV' tab highlighted, a search bar with filters for 'manual clock-in/out', 'has refused tasks', and a 'Show:' dropdown set to 'Last 30 days'. At the bottom, there are pagination controls showing 'Page 1 of 1' and 'Page Size: 25', along with a status indicator 'Displaying 1 - 3 of 3'.

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.

| Unique Rate ID | Discipline | Chg Code | Rate Details | Active | Caregiver Name | Registry Fees | | Pay Rates | |
|----------------|------------|----------|--------------|--------|----------------|---------------|--------|-----------|--------|
| | | | | | | Hourly | Flat | Hourly | Flat |
| 729279 | CNA | 35010 | | ✓ | Test, Ray | \$3.00 | \$0.00 | \$15.00 | \$0.00 |

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.

The screenshot shows the 'Financial' tab interface. At the top, there is a navigation bar with the 'Financial' tab selected. Below the navigation bar is a toolbar with icons for adding, editing, deleting, and refreshing. A table displays the current payment method:

| Type | Information | Bank/Billing Name | Default |
|--------------|---|--------------------|---------|
| Pay by Check | Check in the amount of \$500.00 every 2 weeks | Daenerys Targaryen | ✓ |

Below the table is the 'Add Financial Record' dialog box. It contains the following fields and options:

- 1** Type: * (Radio buttons for Bank Account, Credit Card, Pay by Check, Pay via Registry Escrow Account)
- Bank Name: [Text Field]
- 2** Account Type: * (Radio buttons for Checking, Savings)
- Account #: * [Text Field] Routing #: * [Text Field]
- Confirm Account #: * [Text Field] Confirm Routing #: * [Text Field]
- 3** Document Upload: [Upload Button]
- AssuriCare Agreement: *
- To process payments the AssuriCare Client Agreement and EFT form are required
- * required
- 4** Save & Close [Button] Cancel [Button]

A purple callout box on the right side of the dialog box contains the following text: "AssuriCare must receive the Client Agreement and EFT form to process payments. If there is an update to the payment information, the client must provide an updated EFT form."



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

Editing a Client – Records

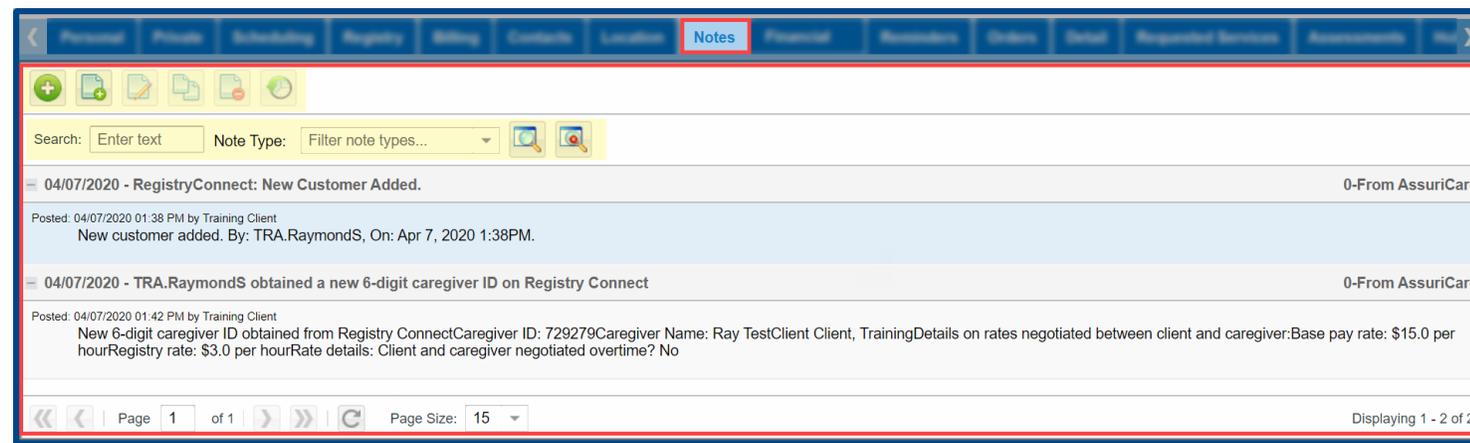


Notes Tab

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.

| Reminder Code | Due Date | Done | Comment | |
|---------------------|----------|------|---------|--|
| No reminders found. | | | | |

Editing a Client – Records

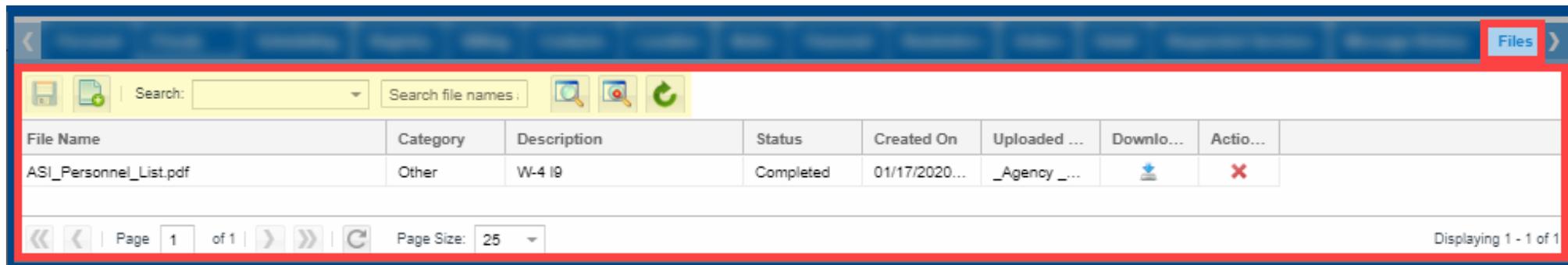


Files Tab

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

A screenshot of a web application interface for the 'Files Tab'. The interface includes a search bar with a dropdown menu and a 'Search file names' input field. Below the search bar is a table with columns for File Name, Category, Description, Status, Created On, Uploaded, Download, and Action. A single row is visible with the file name 'ASI_Personnel_List.pdf', category 'Other', description 'W-4 19', status 'Completed', and creation date '01/17/2020...'. The bottom of the interface shows pagination controls for 'Page 1 of 1' and a page size of '25'. The text 'Displaying 1 - 1 of 1' is visible in the bottom right corner of the table area.

| File Name | Category | Description | Status | Created On | Uploaded ... | Downlo... | Actio... |
|------------------------|----------|-------------|-----------|---------------|--------------|-----------|----------|
| ASI_Personnel_List.pdf | Other | W-4 19 | Completed | 01/17/2020... | _Agency _... | | |

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.

The screenshot shows a software interface with a navigation bar at the top containing tabs like 'Home', 'Client', 'Records', 'Data', 'List', 'Registered Services', 'Print', 'Edit', 'Manage History', and 'File'. The 'History' tab is selected and highlighted with a red box. Below the navigation bar is a filter section with a dropdown menu labeled 'Filter: Select field name...', a date range dropdown set to 'All Dates', and two funnel icons. The main area contains a table with the following columns: 'Date', 'Field Name', 'Old Value', and 'New Value'. The table has two entries:

| Date ↓ | Field Name | Old Value | New Value |
|------------------------|--|-----------|----------------------------------|
| 04/10/2020 03:35 PM | Insert by Joe, Test Client Pays Mileage: Client wishes to send 1099: Gender: | | true Not Yet Selected None |
| 04/10/2020 03:35 PM | Insert by Joe, Test Phone Number: Phone Type: | | (555) 555-5555 Home |



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

RegistryConnect Scheduler interface. A red circle '1' highlights the 'Scheduler' tab. A red circle '2' highlights the 'Create Visits' button. A red circle '3' highlights the 'Select Client' dropdown menu, which is open and shows a list of clients with 'James Dean' selected.

Via the Clients tab

RegistryConnect Clients tab. A red circle '1' highlights the 'Clients' tab. A red circle '2' highlights the 'Client' tab. A red circle '3' highlights the search bar.

Via the Orders tab in the Client Record

RegistryConnect Client Record interface. A red circle '1' highlights the 'Clients' tab. A red circle '2' highlights the 'James Dean' client record. A red circle '3' highlights the search bar. A red circle '4' highlights the 'Orders' tab. A red circle '5' highlights the 'Create Visit' button.

Creating Client Visits

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

Create Visits for [Astair, Fred] start on [8/3/2020]

Date Type: Single 1 Multi

Start Date: 08/03/2020 Duration: 04:00 Start Time: 08:00 AM End Time: 12:00 PM 2

Recurrence 3

Daily Weekly Monthly Yearly

Every 1 day(s) Every weekday

No end date End after: occurrences End by:

To create a single visit or recurring visit, select Single and input the start date, start time, and end date. Check Recurrence to fill out the recurrence information. Click next to continue

4

Create Visits for [Astair, Fred] start on [8/3/2020]

Date Type: Single 1 Multi

Duration: 04:00 Start Time: 08:00 AM End Time: 12:00 PM

Selected Dates:

Aug 03 2020 Aug 04 2020 Aug 06 2020

To create a visit with multiple dates, select Multi. Click the dates on the calendar and input the start and end times. Click next to continue

Note: Multi date visit selections do not have a recurrence.

3

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.

1 Use / Update Existing Rate ID

2 Code: 37003 - Companion Hourly

3 35002 - CNA Live-In

4 Pay Rate: Daily: \$ 225.00

5 Finish

To assign a caregiver with an existing rate ID, select Use / Update Existing Rate ID. Select the appropriate charge code to filter the list of caregivers with existing rate IDs.

Select the caregiver you want to assign. If needed, update the rates for that Rate ID. Click Finish to schedule the visit.

| Rate Code | Caregiver | Description | Registry Fees | | | |
|-----------|--------------|-------------|---------------|--------|---------|--------|
| | | | Hourly | Flat | Day | Hourly |
| 661599 | Ball, Lucile | CNA Live-In | \$0.00 | \$0.00 | \$75.00 | \$0.00 |
| 661814 | Koontz, ... | CNA Live-In | \$0.00 | \$0.00 | \$75.00 | \$0.00 |
| 661653 | Reid, Tara | CNA Live-In | \$0.00 | \$0.00 | \$75.00 | \$0.00 |
| 661600 | Rogers, ... | CNA Live-In | \$0.00 | \$0.00 | \$75.00 | \$0.00 |

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.

1 Create New Rate ID

Select rate code:

| Rate Code | Caregiver | Description | Registry Fees | | | |
|-----------|-----------|-------------------|---------------|--------|---------|---------|
| | | | Hourly | Flat | Day | Hourly |
| | | CNA Hourly | \$6.00 | \$0.00 | \$0.00 | \$12.00 |
| | | CNA Live-In | \$0.00 | \$0.00 | \$75.00 | \$0.00 |
| | | Companion Hourly | \$7.00 | \$0.00 | \$0.00 | \$10.00 |
| | | Companion Live-In | \$0.00 | \$0.00 | \$75.00 | \$0.00 |

2

The Client zone is: [...]

Assign Caregiver: [...]

Subscriber:*

Pay Rate:

Registry Fee: Daily: \$ 75.00

Rate Details:

3 Assign Caregiver: Bacall, Lauren (CNA)

Subscriber:* 1 - Private Pay, , Fred Astair

Pay Rate: Hourly: \$ 12.00

Registry Fee: Hourly: \$ 6.00

Rate Code: [...]

4

5 Rate Details: CNA Hourly

6 Finish

To create a new rate ID for a caregiver and assign them to the visit, select Create New Rate ID. Select the appropriate charge code to create the rate ID with.

Select a caregiver from the Assign Caregiver dropdown menu. The list will be populated with only caregivers that are skilled for that charge code. Adjust the pre-populated rates if needed and add a Rate Details comment. Click Finish to schedule the visit.

Note: "I will assign later" can be selected if you wish to create an unassigned visit.

The Rate Code will auto-generate. This is the 6 digit caregiver ID that is visible in the mobile app for check in and out. Rate Details are visible as well.

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.

1 Select the caregiver and the charge code from the dropdown menus. Update the rates if needed. Check Overtime if overtime is applicable and update the Rate Details field.

2 The rates will populate based on the charge code selected. You can change the pre-populated rates to reflect the rates negotiated between the client and caregiver

3 The unique rate ID generates once the rate is saved. This is the 6-digit caregiver ID that the caregiver will view in the mobile app when checking in or out for that client for that particular type of shift. Rate Details are also viewable by the caregiver.

If Overtime is going to be used, consult with your AssuriCare Account Manager to ensure that it is tracked properly.

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

1 Scheduler Clients Caregivers Referral Sources Reports Tasks Messages Settings

Schedule for [All Clients] [All Caregivers] August 3 - 9, 2020

All Clients

2 8:00a-12:00p Astair, Fred

3 Edit Visit for [Astair, Fred] start on [Mon 8/3/2020 8:00 AM] code [734904]

Visit Details Visit History Client C

Client: Astair, Fred Subscriber: PVT/Non

To edit a single visit from the Scheduler, double click the visit. You can change the date, time, or charge code, as well as the assigned caregiver or visit status. Changing the caregiver for the visit will not change the rest of the visits if it is part of a recurring series.

To change the charge code of the visit, click Show Codes and select a new one. This will change the caregivers list for the Assign Caregiver drop down.

Visit Start: 08/03/2020 Duration: 04:00 Start Time: 08:00 AM End Time: 12:00 PM

Rate Code: 734904 : CNA Hourly Client Zone: East

Subscriber*: 1 - Private Pay, , Fred Astair

Assign Caregiver: Bacall, Lauren [CNA] Find Available

Visit Status: Ok

Comment: Type a short comment...

Pay Rate: Hourly: \$ 12.00

Registry Fee: Hourly: \$ 6.00 Rate Code: 734904

Show Codes

Save & Close Cancel

Edit Client Visits

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

On the Client Record, click on the Orders Tab and select the order you would like to edit and click the Edit icon.

If you select an order with recurring visits, the edit options are only to end the series or extend it. If other changes are needed, end this series and create a new one.

Note: If an existing order has no completed visits, the entire order may be edited.

This Order has Visit(s) that can not be removed. You may only end or extend the order. The earliest end date you can select is 07/06/2020.

| Begins On ↑ | From | To | Charge Code | Description | Caregiver | Recurrence |
|-------------|---------|----------|-------------|-------------|--------------------|--------------------------|
| 09/02/2019 | 8:00 AM | 8:00 AM | 35002 | CNA Live-In | Ball, Lucile [CNA] | Every Wed, Thu, Fri, Sat |
| 09/02/2019 | 8:00 AM | 8:00 AM | 35002 | CNA Live-In | Rogers, Ginger | |
| 05/26/2020 | 6:00 AM | 10:00 AM | 35002 | CNA Live-In | Reid, Tara [CNA] | |
| 08/03/2020 | 8:00 AM | 12:00 PM | 35001 | CNA Hourly | Bacall, Lauren | |

Page 1 of 1 | Page Size: 50

July 2020

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 28 | 29 | 30 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |

Order End Date: 07/06/2020

Save Cancel

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.

The screenshot shows the 'Create Visits for [Astair, Fred] start on [8/4/2020]' window. It features two radio buttons at the top: 'Use / Update Existing Rate ID' (selected) and 'Create New Rate ID'. A red circle with the number '1' points to these options. Below is a 'Select rate code:' section with a dropdown menu showing '35001 - CNA Hourly' and a search field. A red circle with the number '2' points to the dropdown. A table below shows 'Registry Fees' with columns for Hourly, Flat, Day, and Hourly, and values of \$0.00, \$0.00, and \$12.00. A white text box with a red border contains the instruction: 'To create a visit with no assigned caregiver, click either Use / Update Existing Rate ID or Create New Rate ID (either option works). Then select the appropriate code and click Finish.' Below the table, 'The Client zone is: East' is shown. The 'Assign Caregiver:' dropdown is set to 'I will assign later', with a purple arrow pointing to it and a purple callout box containing the note: 'Note that the Assign Caregiver field should remain as I will assign later'. The 'Subscriber:' dropdown is set to '1 - Private Pay, , Fred Astair'. 'Pay Rate: Hourly: \$ 12.00' and 'Registry Fee: Hourly: \$ 6.00' are displayed. At the bottom, there are 'Back' and 'Finish' buttons. A red circle with the number '3' points to the 'Finish' button.

| | | Registry Fees | | | | |
|-----------|-----------|---------------|--------|--------|--------|---------|
| Rate Code | Caregiver | Description | Hourly | Flat | Day | Hourly |
| | | | | \$0.00 | \$0.00 | \$12.00 |

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.

RegistryConnect

Schedule for [All Clients] [All Caregivers] August 3 - 9, 20

1 Scheduler Clients Caregivers Referral Sources Reports Tasks Messages Settings

All Clients

Caregiver Hours: 178:00 Billable Hours: 178:00

Monday 8/3 42:00 42:00

Unassigned visits show in orange

2 CNA 8:00a-12:00p Ast...

Bacall, Lauren [CNA] 8:00a-12:00p Astair, Fred

Ball, Lucile [CNA]

Saubier, Scott [CNA]

3 To assign a caregiver, either select a caregiver from the drop down menu or click Find Available.

Edit Visit for [Astair, Fred] start on [Mon 8/3/2020 8:00 AM] code [35001]

Visit Details Visit History Client Orders Captured Documents

Client: Astair, Fred Subscriber: I

To change the charge code of the visit, click Show Codes and select a new charge code. This will change the caregivers list for the Assign Caregiver drop down.

Visit Start: 08/03/2020 Duration: 04:00 08:00 AM 12:00 PM

Rate Code: 35001 : CNA Hourly Client Zone: East Show Codes

Subscriber*: 1 - Private Pay, , Fred Astair

Assign Caregiver: I will assign later Find Available

Visit Status: Unassigned

Comment: Type a short comment...

Pay Rate: Hourly: \$ 12.00

Registry Fee: Hourly: \$ 6.00 Rate Code: 0

Save & Close Cancel

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.

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.

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.

Find Availability Criteria

Caregiver Skill Level: All Applicable Skills

Caregiver Zone(s): East

Special Criteria

Evaluate Skills vs Needs

Include Time and Distance Calculations

Filters: Familiar Client Can Drive

Find Cancel

The search results will show those available without a conflict

| Caregiver | Skill | Available | Conflict | Zone | Distance | Time |
|-----------------------------------|-------|-----------|----------|-----------------------|----------|---------|
| Diveto, Danny (444) 444-4444 | CNA | Yes | No | North South East West | Yes | 0 60 60 |
| Gomez, Selena (225) 222-2222 | CNA | Yes | No | North South East West | Yes | 0 60 60 |
| Hepburn, Katherine (727) 555-5555 | CNA | Yes | No | North South East West | Yes | 0 60 60 |
| Koontz, Drew (777) 777-7777 | CNA | Yes | No | East | Yes | 0 50 50 |

Select & Close Cancel

If there is a caregiver you find in the search that you want to assign, select the caregiver and click Select & Close to assign

To offer the visit to caregivers via text, click the phone icon beside each. Icons with an orange halo mean they will receive a text. Click the Phone icon in the top left to review and send the text message.

Send New Visit Message for [Astair, Fred]

To: Diveto, Danny [CNA], Gomez, Selena [CNA]

Message:* Visit available 08/03/2020 08:00 AM to 08/03/2020 12:00 PM for [Astair, Fred]

*required 78 characters of max 159.

Send Cancel

Only caregivers with validated cell phone numbers will have the phone icon

| Caregiver | Skill | Available | Conflict | Zone | Distance | Time |
|-----------------------------------|-------|-----------|----------|-----------------------|----------|---------|
| Diveto, Danny (444) 444-4444 | CNA | Yes | No | North South East West | Yes | 0 60 60 |
| Gomez, Selena (225) 222-2222 | CNA | Yes | No | North South East West | Yes | 0 60 60 |
| Hepburn, Katherine (727) 555-5555 | CNA | Yes | No | North South East West | Yes | 0 60 60 |
| Koontz, Drew (777) 777-7777 | CNA | Yes | No | East | Yes | 0 50 50 |

Select & Close Cancel

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.

Quick Summaries

Daily Summary 1 Message Alerts (1) Caregiver Reminder Alerts (0) Client Reminder Alerts (0) Unassigned & Caregiver Not

Show: Last 7 days Show Inactive

| ID | Visit Date | Start | Stop | Charge Co... | Client | Replies | Caregivers |
|-----|------------|----------|----------|--------------|--------------|---------|------------|
| 117 | 08/03/2020 | 08:00 AM | 12:00 PM | 35001 | Astair, Fred | 0 | |

To manage the messages, use the Message Alerts tab under Quick Summaries on the Scheduler by double clicking into the message

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

Message #117 Activity for [Astair, Fred], Mon 08/03 08:00 AM - [35001] CNA Hourly

Show: Last 7 days

| Date/Time | Sent To | Caregiver | Message |
|---------------------|-----------|---------------------|---|
| 07/31/2020 04:44 PM | 225222... | Gomez, Selena [CNA] | Visit available 08/03/2020 08:00 AM to 08/03/2... |
| 07/31/2020 04:44 PM | 777777... | | |
| 07/31/2020 04:43 PM | | | |

Assign Visit Message for [Gomez, Selena [CNA]]

Assigned To: Gomez, Selena [CNA]

Message:* Thank you for accepting[Astair, Fred]on Mon 08/03 08:00AM to 12:00PM
72 characters of max 159.

Message to declined Caregivers:* Visit no longer available for[Astair, Fred]on Mon 08/03 08:00 AM to 12:00PM
78 characters of max 159.

* required

Assign and Send Cancel

Select the caregiver and click the person icon. Click Assign and Send to assign the caregiver to the visit and send a confirmation text. All other messaged caregivers will get a declined text

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.

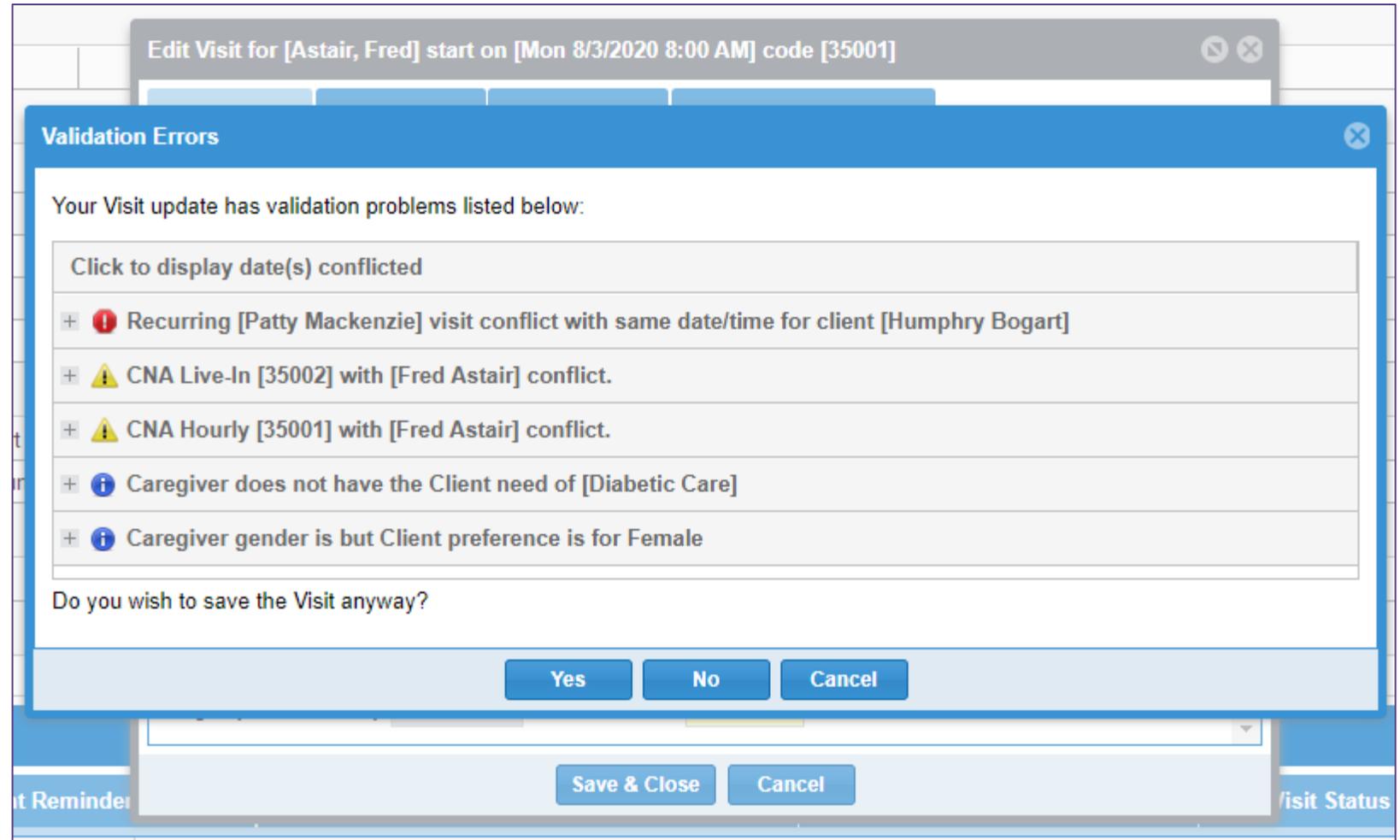
The screenshot illustrates the workflow for creating a new rate when one does not exist for a specific caregiver and client. It features several key elements:

- Callout 1:** A red box with the text "If you try to assign a caregiver that does not have a rate ID with that client, you will be prompted to create one" pointing to the "No Rate Found" pop-up.
- Callout 2:** A red box with the text "Update the pre-loaded rates and add a Rate Detail comment. Click Add to finish. A pop up will appear with the new Rate ID" pointing to the "Add New Rate" form fields.
- Callout 3:** A red box with the number "3" pointing to the "Rate Details" field in the "Add New Rate" form.
- Callout 4:** A red box with the number "4" pointing to the "Add" button in the "Add New Rate" form.
- Pop-up 1:** "No Rate Found" dialog box with the message: "No existing rate found for Mackenzie, Patty [CNA]. Create a new rate?" and buttons for "Yes", "No", and "Cancel".
- Pop-up 2:** "New Rate Code" dialog box with the message: "New rate code created: 734907" and an "OK" button.
- Form Fields:** The "Add New Rate" form includes fields for "Caregiver" (Mackenzie, Patty [CNA]), "Charge Code" (35001 - CNA Hourly), "Pay Rates" (Hourly: 12.00), "Registry Fees" (Hourly: \$ 6.00), "Overtime" checkbox, and "Rate Details" (35001 - CNA Hourly).
- Footer Note:** A purple box at the bottom states: "If Overtime is going to be used, consult with your AssuriCare Account Manager to ensure that it is tracked properly."

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



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.

RegistryConnect

Home Scheduler Clients Caregivers Referral Sources Reports Tasks M

Visits on the Scheduler will show in different colors based on the visit status

All Clients All Caregivers All Zones

| Caregiver Hours: 184:00 Billable Hours: 184:00 | Monday 8/3 42:00 42:00 | Tuesday 8/4 22:00 22:00 | Wednesday 8/5 36:00 36:00 | Thursday 8/6 36:00 | Friday 8/7 26:00 26:00 |
|--|------------------------------|-------------------------------|---------------------------------|-------------------------|------------------------------|
| 05:00 AM (5) ● | | | | | |
| Althof, Sue [CNA] | 5:00a-9:00a Dean, James | 5:00a-9:00a Dean, James | 5:00a-9:00a Dean, James | 5:00a-9:00a Dean, James | 5:00a-9:00a Dean, James |
| 06:00 AM (11) ●●●●● | | | | | |
| | | | CNA 6:00a-10:00a Nick,... | | |
| Craig, Meg [CNA] | 6:00a-10:00a Tracy, Sp... | | * 6:00a-10:00a Tracy, Sp... | | * 6:00a-10:00a Tracy, S... |
| MacEachern, Aileene [C...] | 6:00a-10:00a Craig, Meg | 6:00a-10:00a Craig, Meg | 6:00a-10:00a Craig, Meg | 6:00a-10:00a Craig, Meg | 6:00a-10:00a Craig, Meg |
| Penn, Sean [CNA] | | 6:00a-10:00a Kennedy, John | | | |

Completed Started Held Canceled Ok



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.

RegistryConnect

Notices (0) Welcome DMO.SarahH@ Demo Registry!

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
- Registry Logo
- Maintenance
 - 2** Registry Tables
 - Charge Codes
 - Payment Codes
 - Adjustment Codes
 - Education Codes
 - Diagnosis Codes

Registry Tables **5**

- Advanced Directives
- Cancellation Comments
- Requested Service
- Client Priority
- Company Types
- Contact Relationship
- Counties
- Discharge Comments
- Ethnic Origin
- Languages
- Referral Types
- Religious Preferences
- 3** Skills
- Removal Reasons

Tip: Drag & Drop to reorder.

| Description | Active | |
|----------------------|--------|---|
| Alzheimers Care | ✓ | ✗ |
| Diabetic Care | ✓ | ✗ |
| Hoyer Lift | ✓ | ✗ |
| Lifting | ✓ | ✗ |
| <input type="text"/> | ✓ | ✗ |

4

Add Skills by click the Add icon and typing the skill name in the new line. Click the Check Mark to save the skill.

Caregiver Record : Smith, Sally [CNA]

Personal Private **Scheduling** Registry Reimbursement Unavailable Photo Coi

Zone:* East North South
 West

Desired Hours Per Week:

Skills: Alzheimers Care Diabetic Care Hoyer Lift
 Lifting

Client Record : [John Doe]

Personal Private **Scheduling** Registry Billing Contacts Location Notes Final

Zone:*

Case Owner:*

Primary Caregiver:

Needs: Alzheimers Care Diabetic Care Hoyer Lift
 Lifting

“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.

The screenshot shows the RegistryConnect interface. The 'Settings' tab is selected (1). In the left sidebar, 'Configuration' is highlighted (2). In the main content area, 'Registry Configuration' is selected (3). At the bottom, the 'Disable Needs vs Skills' checkbox is highlighted (4). A purple callout box states: 'If unchecked, this will ensure warnings are generated if a caregiver does not have a skill that the client needs'.

The screenshot shows a 'Validation Errors' dialog box. A red box highlights the warning text: 'If enabled, a warning pops up if a visit is scheduled with a caregiver that does not have the skill that the client needs. *This will not prevent scheduling the visit*'. The dialog box content includes: 'Your new Order has validation problems listed below:', 'Click to display date(s) conflicted', and a list item: 'Caregiver does not have the Client need of [Diabetic Care]'. Buttons for 'Yes', 'No', and 'Cancel' are at the bottom.