



# Sandata

Get more right from the start

Connecticut Department of Mental Health and  
Addiction Services

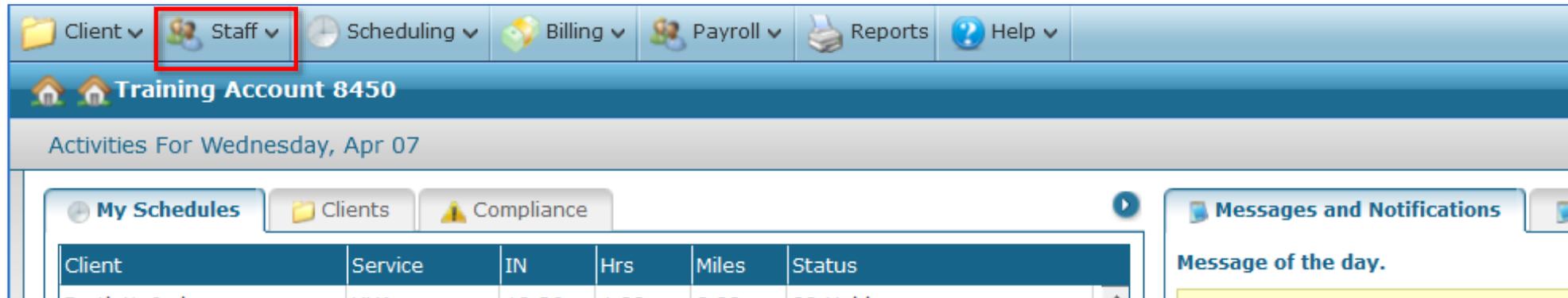
Electronic Visit Verification (EVV) Provider Training  
Staff Module

# Agenda

- Staff Module Overview
- Staff Search functions
- Adding New Staff
- Staff Record Navigation
- Modify, Activate/ De-activate Staff Members
- User Security
- Adding Exclusions & Attributes

# Accessing the Staff Module

- ▶ Clicking the Staff icon on the menu bar opens the search screen.
- ▶ By default, search parameters will be set for Active Field Staff.
- ▶ Additional search filters are available.



The screenshot displays the Sandata software interface. At the top, a menu bar contains several items: Client, Staff, Scheduling, Billing, Payroll, Reports, and Help. The Staff menu item is highlighted with a red rectangular box. Below the menu bar, the interface shows the user's account information, "Training Account 8450", and the date "Activities For Wednesday, Apr 07". A navigation bar includes "My Schedules", "Clients", and "Compliance". A table with columns for Client, Service, IN, Hrs, Miles, and Status is partially visible. On the right side, there is a "Messages and Notifications" panel with a "Message of the day" section.



# Staff Search Filters

- ▶ Caregivers are designated as Field staff
- ▶ Office staff are designated as Users
- ▶ Use appropriate filters to reduce the results list
- ▶ Use the Position filter to search by job role

The screenshot shows a 'Staff Search' window with a blue header bar. The header contains a search icon, the text 'Staff Search', and several action buttons: 'Clear Filter' (with a funnel icon), 'Refresh' (with a circular arrow icon), 'New Staff' (with a plus icon), 'Print' (with a printer icon), 'PDF' (with a dropdown arrow), and 'Close' (with a red X icon).

Below the header is a 'Search Filters' section with a white background and a blue border. It contains the following fields and controls:

- Company:** dropdown menu
- Location:** dropdown menu
- Staff Manager:** dropdown menu
- Coordinator:** dropdown menu
- Status:** dropdown menu (currently set to '02- Active')
- Reason:** dropdown menu
- First Name:** text input field
- Last Name:** text input field
- Agency ID:** text input field
- SSN:** text input field with a pattern of three dashes and three numbers
- ZIP:** text input field with a pattern of three numbers, a dash, and four numbers
- Team:** dropdown menu
- Agency:** dropdown menu
- Position:** dropdown menu
- Language:** dropdown menu
- Role Selections:** a list of checkboxes:
  - Users
  - Field Staff
  - Contractors
  - Clinical Manager
  - Non-Compliant Staff
- Reassign Manager/Coordinator:** a blue button



# Adding New Staff

- ▶ To enter new staff, click the **New Staff** button on the Staff search screen...the New Staff Wizard opens:



- ▶ Minimum Data needed to enter a new staff member:
  - First Name
  - Last Name
  - Social Security Number – (Only enter last 5 digits and fill with leading zero's)
    - If there are multiple staff members that share the same last 5-digits of their social security numbers, you may enter the second staff member's SSN and increment the first digit of from a 0 to a 1

Example:  
Staff Member #1 SSN is: 123-45-6789; enter: 000-05-6789  
Staff Member #2 SSN is: 987-65-6789 (note- the last 5 digits are the same as Staff Member #1); Provider will enter into Santrax: 100-05-6789

  - Position



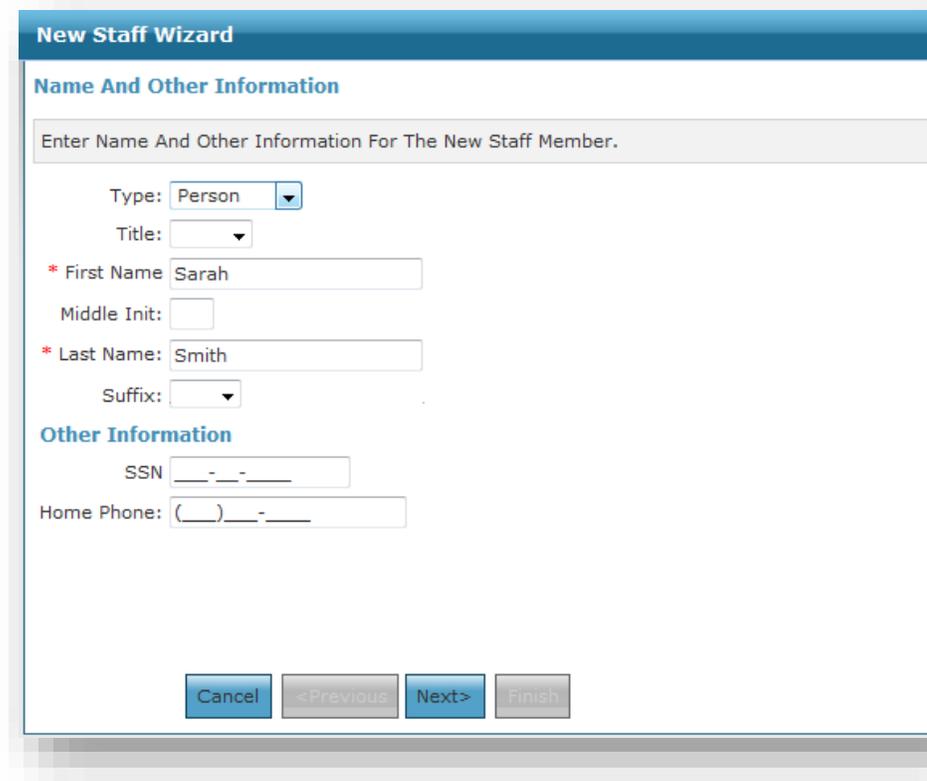
# Adding New Staff

- ▶ The New Staff Wizard also asks for Company, Location and Admit type.
  - Selecting specific values on these screens limit staff to only those items selected
  - If the staff is available across all values, do not select anything
  - Click **Next** without selecting for maximum staff availability/flexibility



# New Staff Wizard – Personal Information

- ▶ Name is required. Phone is recommended.



**New Staff Wizard**

**Name And Other Information**

Enter Name And Other Information For The New Staff Member.

Type:

Title:

\* First Name:

Middle Init:

\* Last Name:

Suffix:

**Other Information**

SSN:

Home Phone:



# New Staff Wizard – Company & Location

- ▶ Selecting Company and/or Location is optional.
- ▶ If selections are made the staff will only be able to work in the selected company/location.
- ▶ Leave blank to allow the staff to work across all companies and locations.

**New Staff Wizard**

**Company**

Which Company will this Staff Member be associated with?

<u>ID</u>	<u>ID</u>	<u>Description</u>
7	4094	CT Agency

**New Staff Wizard**

**Location**

Which Location will this Staff Member be associated with?

<u>ID</u>	<u>Description</u>
H	Hartford
S	New London



# New Staff Wizard – Admission Types

- ▶ Admission Types may include options from other payers in addition to Connecticut
- ▶ Selecting Admission Type is optional. If selected it will limit the staff to only working those admission types.



The screenshot shows a software window titled "New Staff Wizard". Inside, there is a section labeled "Admission Type" with a text prompt: "Which Admission Types can this Staff Member be associated with?". Below this prompt is a table with two columns: "ID" and "Description".

ID	Description
ABI	Acquired Brain Injury
ABP	Acquired Brain Injury
CHI	CT Home Care Program
CHP	CT Home Care Program
PCI	Personal Care Assistant – Waiver-Eligible Clients
PCP	Personal Care Assistant – Waiver-Eligible Clients



# New Staff Wizard - Position

- ▶ Select the appropriate position for the staff (can only select one position)



The screenshot shows a web application window titled "New Staff Wizard". Below the title bar, there is a section labeled "Position". Underneath, a text input field contains the question "What Position will this Staff Member hold?". Below the input field is a table with two columns: "ID" and "Description". The table lists various job positions with their corresponding IDs.

ID	Description
CLSS	Community Living Support Services
COMP	Companion
HHA	Home Health Aide
HMK	Homemaker
ILST	Independent Living Skills Training
LCSW	Licensed Clinical Social Worker
LPN	Licensed Practical Nurse
OFC	Office Staff
OT	Occupational Therapist
OTHER	Other
PCA	Personal Care Attendant
PT	Physical Therapist
RA	Recovery Assistant



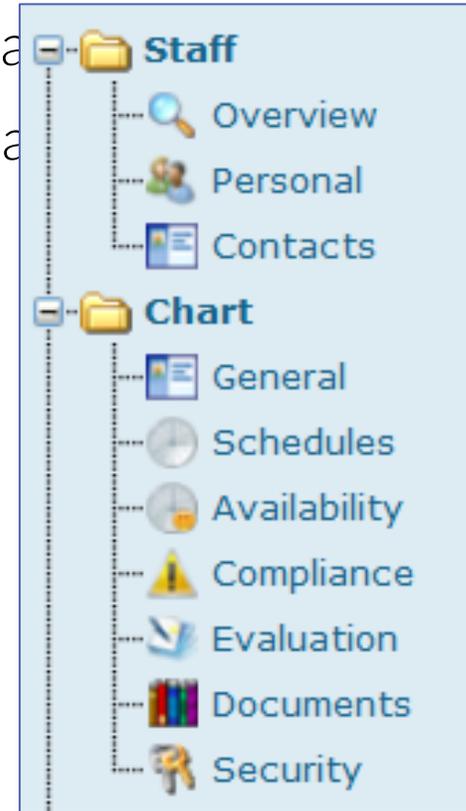
# New Staff Wizard - Position

- ▶ Users with the position of **Office Staff** and permissions of **Admin** have additional responsibilities of:
  - Creating new users
  - Assigning/updating security permissions to users
  - Manually correct/confirm exception visits



# Staff Record Navigation

- ▶ Staff profile organizes information into folders for easy navigation
- ▶ Staff folder focuses on personal and demographic information
- ▶ Chart folder focuses on work related information



# Staff Folder > Overview Screen

The **Overview** screen provides a summary of information from other screens in the staff record.

The screenshot shows a web-based interface for a staff member's record. The window title is "Halliday, Payton" and it has "Save" and "Close" buttons in the top right. On the left is a navigation tree with categories: Staff, Chart, and Training. Under "Staff", "Overview" is selected and highlighted with a red box. The main content area is divided into several sections:

- Personal:** Halliday, Payton; 26 Harbor Park Drive; Port Washington ,NY 11050
- Employment and Other Dates:** Hire Date: 01/01/2014; First Day Worked: ; Released Date: ; Re-Hire Date: ; Born: 11/07/1966
- Compliance:** Compliant: Yes; Thru: 12/31/2055
- Contacts:** Emergency: Halliday, James; Home:(516) 555-1212; Mobile:(917) 555-1212
- Recent/Upcoming Events:** (Empty section)
- Links:** (Empty section)
- Other Notes/Comments:** (Empty section)



# Staff Folder > Personal Screen

- ▶ Staff address (can be used for proximity searches when scheduling)
- ▶ Language (can be matched to client needs when scheduling)
- ▶ Entering the ZIP code automatically fills in City, State and County

**Halliday, Payton** Save Close

**Name**

Title:

First Name: Payton

Middle Init:

Last Name: Halliday

Suffix:

**Other Information**

Birthdate: 11/07/1966

SSN: 123-45-7777

Marital: M- Married

Gender: 2- Female

Language: E- English

Ethnicity:

**Current Address**

Name:

Address: 26 Harbor Park Drive

Apt.:

City: Port Washington

State: NY Zip: 11050-

County: Nassau

Region:

Type:

Evacuation Zone:

**Phone Numbers, Etc.**

Home: ( ) - -

Mobile: ( ) - -

Work: ( ) - - Ext

Fax: ( ) - -

Email:  Mobile:

**Images (0/0)**

**Clients Excluded from Staff**

Client Name	Other ID	Exclusion Type	Reason for Exclusion



# Staff Folder > Contacts Screen

- ▶ Add as many contacts as available, designating type of contact, relation to staff and contact information

The screenshot displays the 'Contacts' screen for a staff member named 'Halliday, Payton'. The interface includes a sidebar with navigation options like 'Overview', 'Personal', 'Contacts', 'Chart', 'General', 'Schedules', 'Availability', 'Compliance', 'Evaluation', 'Documents', 'Payroll', 'Security', 'Training', 'In-Service', and 'Training'. The 'Contacts' section is highlighted in the sidebar. The main area shows a table with columns for Name, Home Phone, Mobile Phone, and Work Phone. A modal window titled 'Contacts - Mozilla Firefox' is open, showing a form for editing a contact. The form includes fields for Name (Title, First Name: James, Middle Init, Last Name: Halliday, Suffix), Current Address (Name, Address: 26 Harbor Park Drive, City: Port Washington, State: NY, Zip: 11050-), Other Information (Type: Emergency, Relation: Spouse), and Phone Numbers, Etc. (Home: (516)555-1212, Mobile: (917)555-1212, Work, Fax, Email, Mobile checkbox). The 'Save' and 'Close' buttons are visible at the bottom of the modal.

Name	Home Phone	Mobile Phone	Work Phone
EMR Halliday, James	(516) 555-1212	(917) 555-1212	

**Contact for staff Halliday, Payton**

**Name**

Title:

First Name: James

Middle Init:

\* Last Name: Halliday

Suffix:

**Other Information**

Type: Emergency

Relation: Spouse

**Current Address**

Name:

Address: 26 Harbor Park Drive

City: Port Washington

State: NY Zip: 11050-

County: Nassau

Type:

Evacuation Zone:

**Phone Numbers, Etc.**

Home: (516)555-1212

Mobile: (917)555-1212

Work: ( ) - - Ext

Fax: ( ) - -

Email:  Mobile:



# Chart Folder > General Screen

- ▶ The General screen contains work related information
- ▶ The Santrax ID is entered by the caregiver to identify themselves during the call process.
- ▶ The Hire Date is populated when the staff is made Active in the Employment Status panel

The screenshot shows the 'General' screen for a staff member named Halliday, Payton. The interface includes a left sidebar with a tree view containing 'Staff', 'Personal', 'Contacts', 'Chart', 'Schedules', 'Availability', 'Compliance', 'Evaluation', 'Documents', 'Payroll', 'Security', 'Training', 'In-Service', and 'Training'. The 'Chart' folder is expanded, and the 'General' option is highlighted with a red box. The main content area is divided into several panels:

- Agency Designations:** Position: Homemaker, Home Location: [dropdown], Agency ID: 012106, Santrax ID: 012106, API: [text], NPI: [text], Hire Date: 01/01/2014, First Day Worked: [calendar], Released Date: [calendar], Re-Hire Date: [calendar], Staff Signature: [text].
- Managers / Etc.:** Staff: [dropdown], Manager: [dropdown], Coordinator: [dropdown], Team: [dropdown], checkboxes for Staff Manager, Marketer, Coordinator, Clinical Manager, and Contractor.
- Employment Status:** 02- Active [dropdown], As Of: 08/18/14.
- Contractor Information:** Agency: [dropdown].
- Other Information:** Class: [dropdown], Military: [dropdown], Transportation: [dropdown], Referral: [dropdown].
- Companies, Locations, and Admission Types:** Each panel has a header and a green plus icon and a red minus icon.



# Chart Folder > General Screen

- ▶ Coordinators
  - Office Staff assigned to receive email alerts
  - Assigned to clients in the client record
- ▶ Staff Managers
  - Above Coordinators in the system
  - Receive higher level alerts
  - Managers are linked to Coordinators in User Staff record
- ▶ Coordinator & Managers require a Santrax code. Use any 3 –character alphanumeric code.
- ▶ Coordinators and Managers also require an email address on the Personal screen.

**Managers / Etc.**

Staff Manager:

Coordinator:

Team:

Staff Manager       Marketer       Coordinator

Clinical Manager       Contractor

Santrax Code:



# Chart Folder > General Screen

- ▶ New staff will appear with a status of **01-Recruit**.
- ▶ Blue arrow next to status changes status.
- ▶ Hire Date is set when staff is made Active.
- ▶ Blue arrow below the status adjusts the effective date of a status change.

The screenshot shows a software interface for managing staff profiles. The window title is "Diaz, Tom" and it has "Save" and "Close" buttons. The left sidebar shows a tree view with "Staff" and "Chart" folders. Under "Chart", the "General" tab is selected and highlighted with a red box. The main content area is divided into several sections:

- Agency Designations:** Position: Home Health Aide, Home Location: [dropdown], Agency ID: [text], Santrax ID: [text], API: [text], NPI: [text], Hire Date: [calendar], First Day Worked: [calendar].
- Managers / Etc.:** Staff, Manager: [dropdown], Coordinator: [dropdown], Team: [dropdown]. Checkboxes for Staff Manager, Clinical Manager, Marketer, and Contractor.
- Employment Status:** 01-Recruit [blue arrow], [blue arrow]. As Of: 03/09/21.
- Contractor Information:** Agency: [dropdown].



# Chart Folder > Schedules Screen

- ▶ Staff's assigned schedules
- ▶ Schedules can be filtered for a specified date range
- ▶ Schedules can be edited from this screen by double-clicking on a schedule line

The screenshot shows the 'Halliday, Payton' Schedules screen. The left navigation pane has 'Schedules' highlighted. The main content area is divided into 'Staff Information' and 'Staff Schedules' sections.

**Staff Information:**  
Address: 26 Harbor Park Drive    City: Port Washington    State: NY    Zip: 11050  
Home:    Mobile:    Work:

**Staff Schedules:**  
Date From: 03/21/2016    Date To: 03/27/2016     Hide Cancelled Events

Page size: 20    6 items in 1 pages

Date	Client	Chart ID	P/1 Pos	Service	EC	P/1 INP	OUTP	P/1 TZ	HrsP	IN	OUT	Hrs	Supplies	Status	PRN	Comments
03/21/16-Mon	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1	1	0		01- Pending
03/22/16-Tue	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1	1	0		01- Pending
03/23/16-Wed	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1	1	0		01- Pending



# Chart Folder > Security Screen

The Security screen is used to grant system access to office staff and mobile device access to field staff.

To create the login credentials:

- ▶ User must have initials (3 character), username and password designated.
- ▶ A 'Set Password' button is displayed upon saving the username

**System Login Privileges**

This Staff Member can log into the system as User.  MVV User

Initials:

Username:

This User is a System Administrator.

**Unique Permissions**

Section	Permit	Enable	Add	Edit	Delete	Admin
A/R	In Collection	<input type="checkbox"/>				
Admin	Change Company or Location	<input type="checkbox"/>				
Admin	EVV Task Reading to EC	<input type="checkbox"/>				
Admin	EVV Task To Service	<input type="checkbox"/>				
Admin	Generate Schedules	<input type="checkbox"/>				
Admin	Merge Clients	<input type="checkbox"/>				

**Group Memberships**

Name
------

**Recent Logins**

Message	Timestamp
---------	-----------



# Chart Folder > Security Screen

## Requirements for Office Staff:

- ▶ Username is not case sensitive
- ▶ Password is case sensitive, must be at least 8 characters long and contain: a capital letter, number and special character.
- ▶ System privileges are determined by Group Membership assignment
- ▶ Choose multiple groups for Office Staff who do both scheduling and billing
- ▶ Only System Administration Oversight will be able to grant user access

## Requirements for Field Staff:

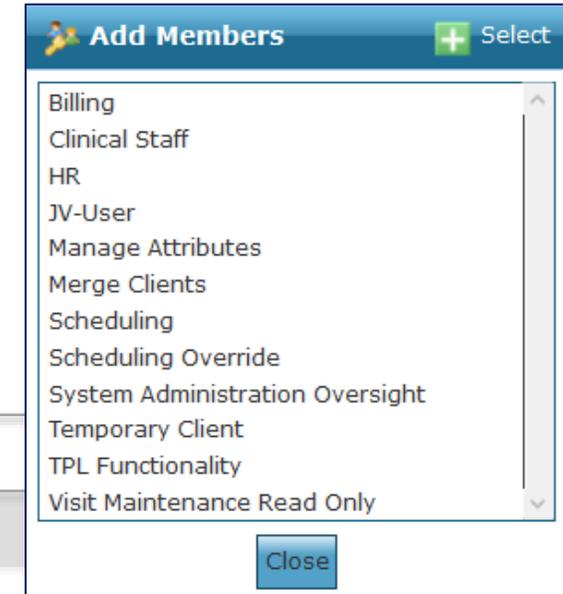
- ▶ Username is not case sensitive and must be alpha or alphanumeric
- ▶ Password is case sensitive, must be at least 8 characters long and contain: a capital letter, number and special character.
- ▶ No Group Membership assignment is needed as field staff do not log into the system, only the device.



# Chart Folder > Security Screen

Module access is determined by Security group assignments on the Security screen

Name	Description
Billing	Responsible for billing functions
Clinical Staff	Staff who use the clinical functions of the system
HR	Access to Staff module
Manage Attributes	Manage staff and client attributes and exclusions
Merge Clients	Allows for the manual merging of clients
Scheduling	Users responsible for creating client/staff schedules

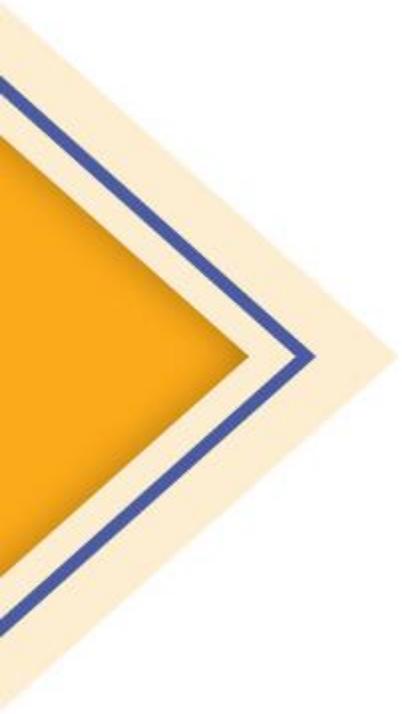


# Chart Folder > Security Screen (cont'd)

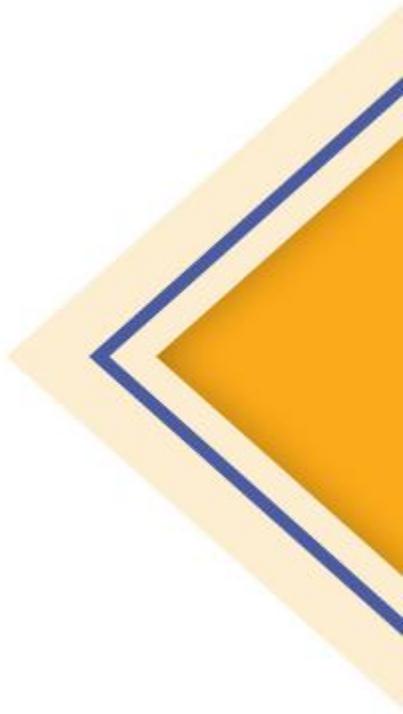
Module access is determined by Security group assignments on the Security screen

<b>Name</b>	<b>Description</b>
Scheduling Override	Allows for the creation of schedules while waiting for authorizations
System Admin oversight	Works alerts, visit dashboard and user security assignment
Temporary client	Allow for the entry of clients on a temporary basis
TPL Fuctionality	Responsible for assigning TPL Payors
Visit Maintenance (Read Only)	Reviews alerts





# Exclusions & Attributes



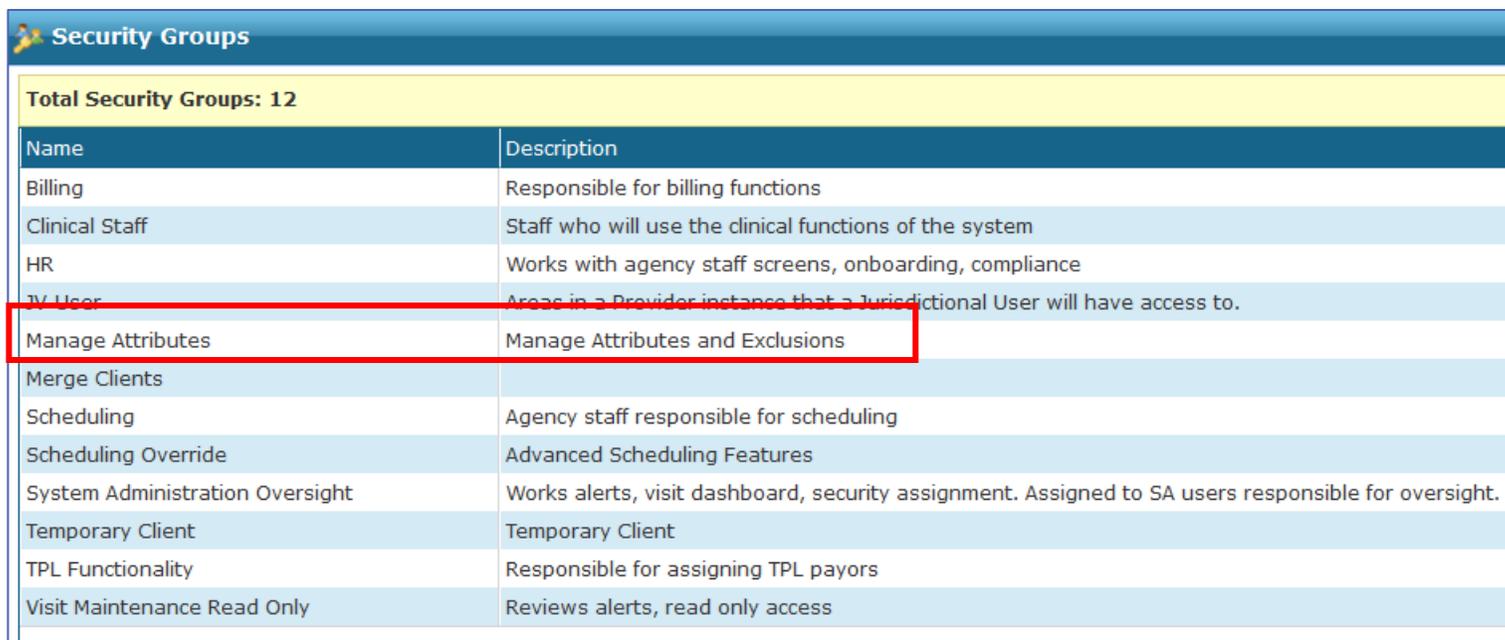
# Introduction

Exclusions limit which staff members are allowed to be assigned to a particular client and which clients are allowed to be assigned to a particular staff member. When exclusions are created in Santrax® Agency Management, users are warned or prevented from creating and editing a schedule that will conflict with the exclusions.



# Exclusion Set-up: User Security

The ability to add and edit client exclusions depends on the assigned security group. The Security Group, 'Manage Attributes', is must be assigned to a user to allow access to Exclusions and Attributes by going to **Staff > Staff Profile > Security**.



Security Groups	
Total Security Groups: 12	
Name	Description
Billing	Responsible for billing functions
Clinical Staff	Staff who will use the clinical functions of the system
HR	Works with agency staff screens, onboarding, compliance
JV User	Areas in a Provider instance that a Jurisdictional User will have access to.
Manage Attributes	Manage Attributes and Exclusions
Merge Clients	
Scheduling	Agency staff responsible for scheduling
Scheduling Override	Advanced Scheduling Features
System Administration Oversight	Works alerts, visit dashboard, security assignment. Assigned to SA users responsible for oversight.
Temporary Client	Temporary Client
TPL Functionality	Responsible for assigning TPL payors
Visit Maintenance Read Only	Reviews alerts, read only access



# Adding Exclusions

1. To exclude clients from a staff member, click the green plus sign in the section 'Clients Excluded from Staff'.

The screenshot displays a software interface for managing staff members. On the left, a navigation pane shows categories like 'Staff', 'Chart', and 'Training'. The main area shows a staff member's profile with fields for 'Name', 'Current Address', and 'Images (0/0)'. A dialog box titled 'Exclusions -- Webpage Dialog' is open, showing the 'Clients Excluded from Staff' section. This section includes a 'Client(s)' dropdown menu, an 'Other ID' field, an 'Exclusion Type' dropdown menu (currently set to 'Prevent'), and a 'Reason for Exclusion' text area. At the bottom of the dialog are 'Save' and 'Close' buttons. In the background, a table titled 'Clients Excluded from Staff' is visible, with columns for 'Client Name', 'Other ID', 'Exclusion Type', and 'Reason for Exclusion'. A red arrow points to a green plus sign button in the top right corner of this table, indicating where to click to add a new exclusion.

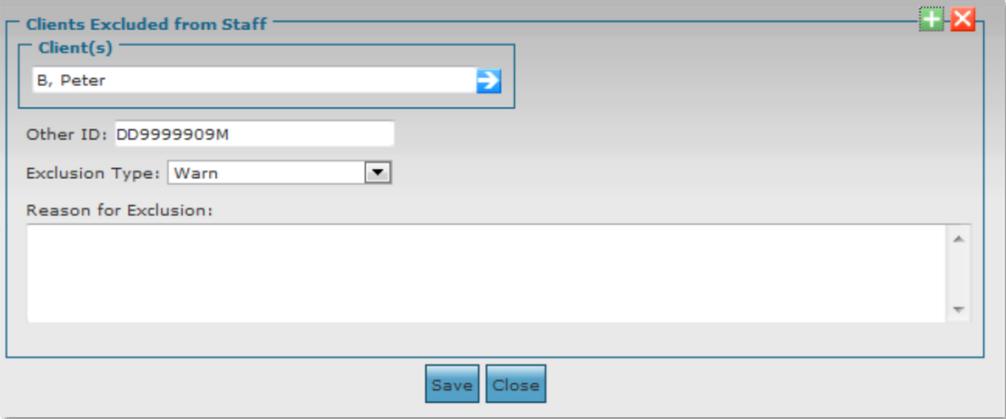
# Adding Exclusions (cont'd)

2. Enter the Client's name by clicking the blue arrow. Use the **Client Search** filter to select a client. If the client has the **Other ID** field populated in their profile it display in the staff exclusion screen.
3. Enter the **Exclusion Type (Prevent/Warn)** and the **Reason for Exclusion**
  - ▶ **Prevent** – when scheduling, a message appears informing the user a schedule cannot be created using the client and staff combination
  - ▶ **Warn** – when scheduling, a warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user can choose to override the warning message or choose another staff member.



# Adding Exclusions (cont'd)

4. Click **Save**.
5. Click **Save** in the *Staff Personal* screen



Clients Excluded from Staff

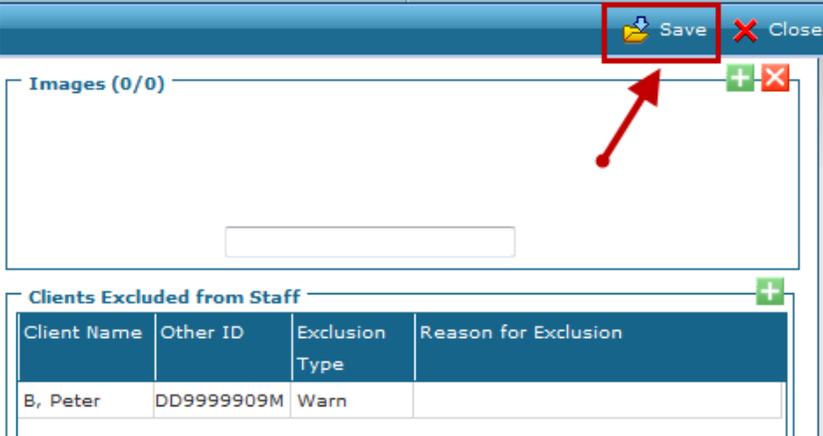
Client(s)  
B, Peter

Other ID: DD9999909M

Exclusion Type: Warn

Reason for Exclusion:

Save Close



Save Close

Images (0/0)

Clients Excluded from Staff

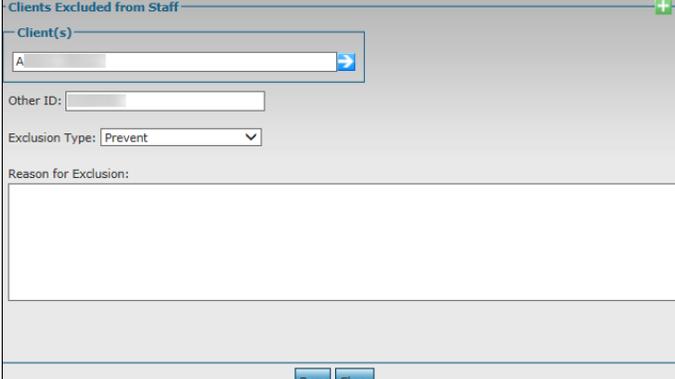
Client Name	Other ID	Exclusion Type	Reason for Exclusion
B, Peter	DD9999909M	Warn	

# Deleting Exclusions

1. Double click an **Exclusion** to open the *Clients Excluded from Staff*
2. Click the red **X** to Delete
3. Click **OK** to confirm
4. Click **Save** to save record updates



Client Name	Other ID	Exclusion Type	Reason for Exclusion
A			



Clients Excluded from Staff

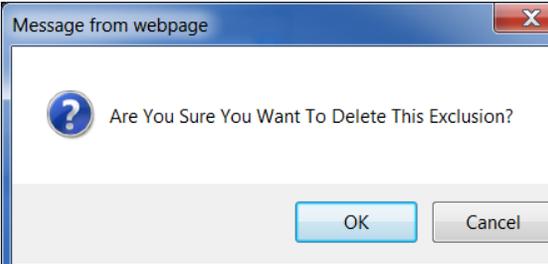
Client(s): A

Other ID:

Exclusion Type: Prevent

Reason for Exclusion:

Save Close



Message from webpage

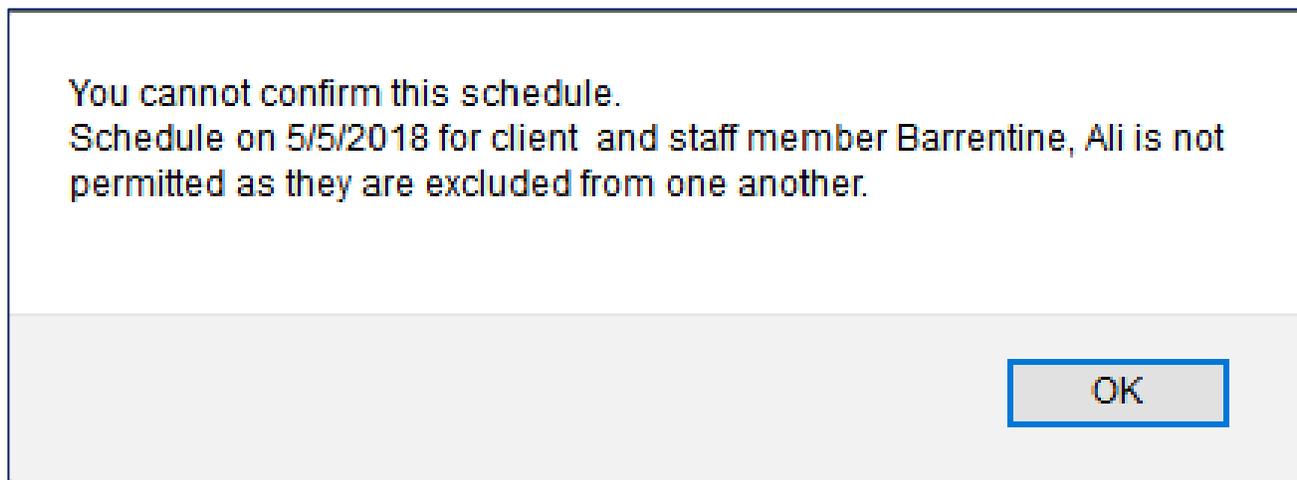
Are You Sure You Want To Delete This Exclusion?

OK Cancel



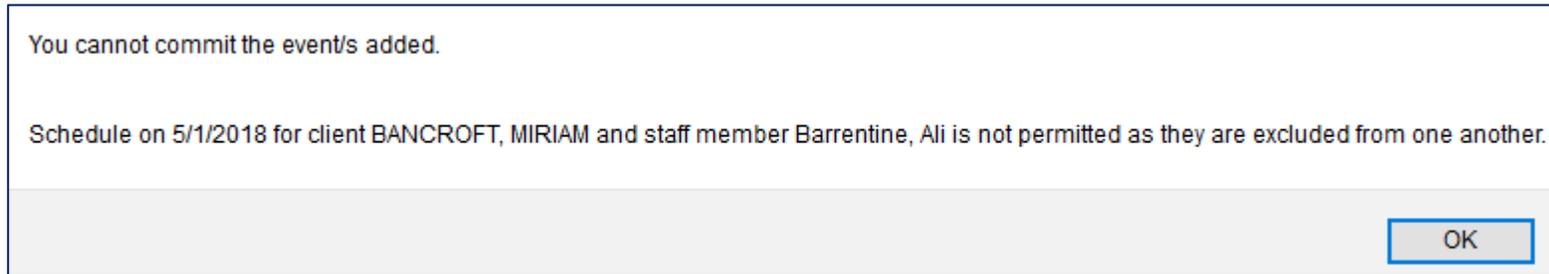
# Scheduling with Exclusions

1. When 'Prevent' is set on an exclusion, the following messages appear if a user attempts to save or commit a schedule with a client and staff member that are excluded from each other. This also applies when a staff member is excluded from a client's payor.
  - Saving from the Schedule Detail screen:



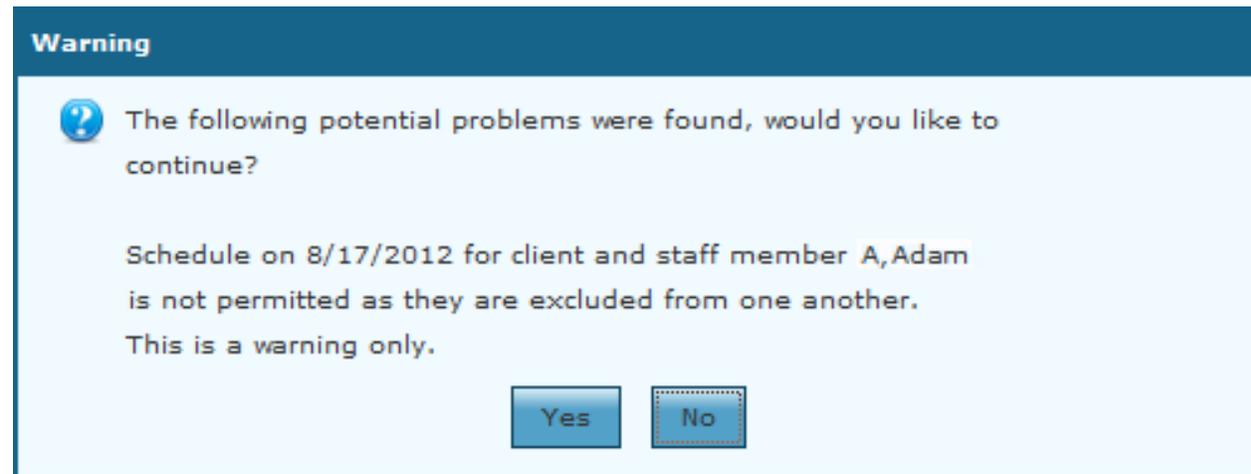
# Scheduling with Exclusions (cont'd)

- Committing from the *New Events* screen:



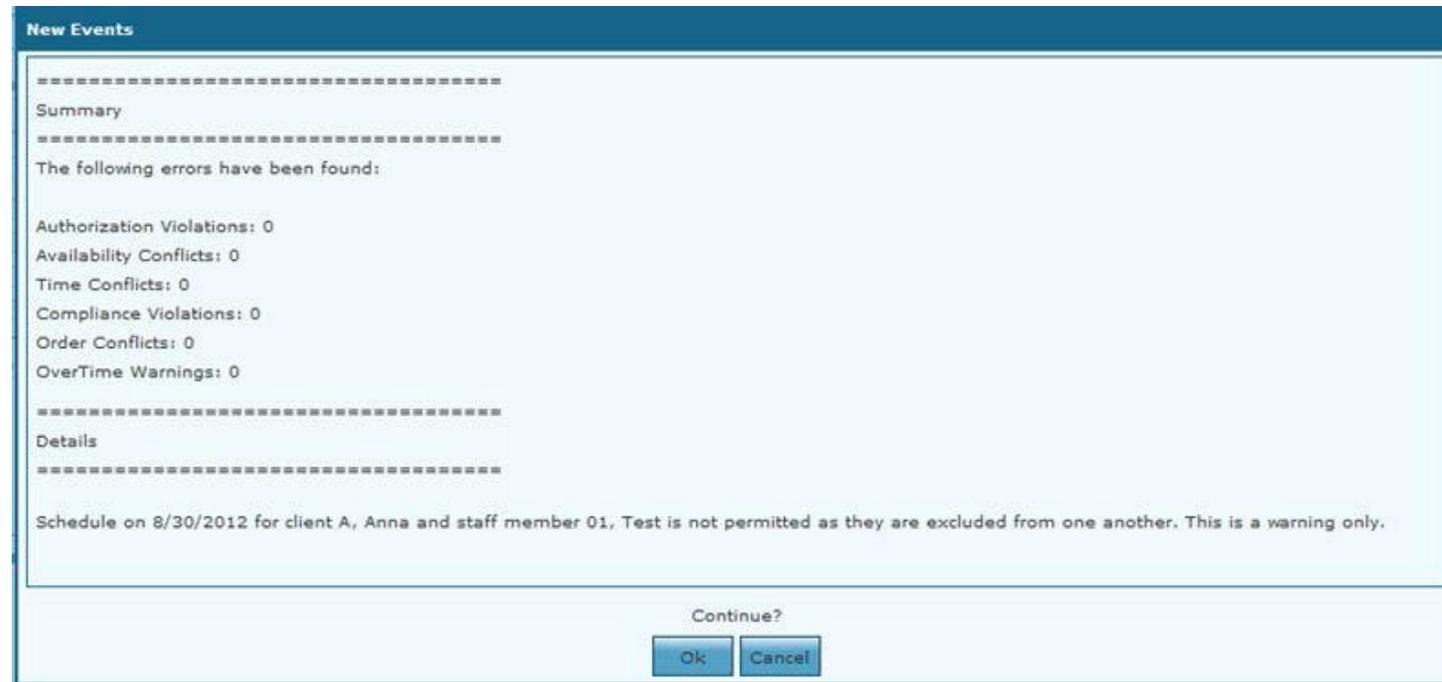
# Scheduling with Exclusions (cont'd)

2. When 'Warn' is set on an exclusion, the following warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user has the option of confirming the schedule.
  - Confirming from the *Schedule Detail* screen



# Scheduling with Exclusions (cont'd)

- ▶ Committing from the *New Events* screen



The screenshot shows a dialog box titled "New Events" with a light blue background and a dark blue header. The content is framed by dashed lines. It includes a "Summary" section, a list of error types with zero counts, a "Details" section, and a warning message. At the bottom, there is a "Continue?" label and two buttons: "Ok" and "Cancel".

Summary

The following errors have been found:

- Authorization Violations: 0
- Availability Conflicts: 0
- Time Conflicts: 0
- Compliance Violations: 0
- Order Conflicts: 0
- OverTime Warnings: 0

Details

Schedule on 8/30/2012 for client A, Anna and staff member 01. Test is not permitted as they are excluded from one another. This is a warning only.

Continue?

Ok Cancel



# Adding Attributes

To assign attributes, from the Personal section of the staff profile, locate the Attributes section of the screen and complete the following steps.

1. Click **Add (+)**.



2. Select the **Attribute**.
3. Select the **Property**.

# Adding Attributes (cont'd)

4. Select the **Values**.
5. Multi-Select using the <Ctrl> or <Shift> key.
6. Select the Requirement checkbox, if applicable (selecting **Requirement** indicates the attribute 5.must be met/satisfied)
7. Click **Save**.

Attribute for staff Beehler, Jenice

General

\* Attribute: Pets

Property: Will Not Service Locations With

\* Values: Cat, Dog, Rabbit, Bird

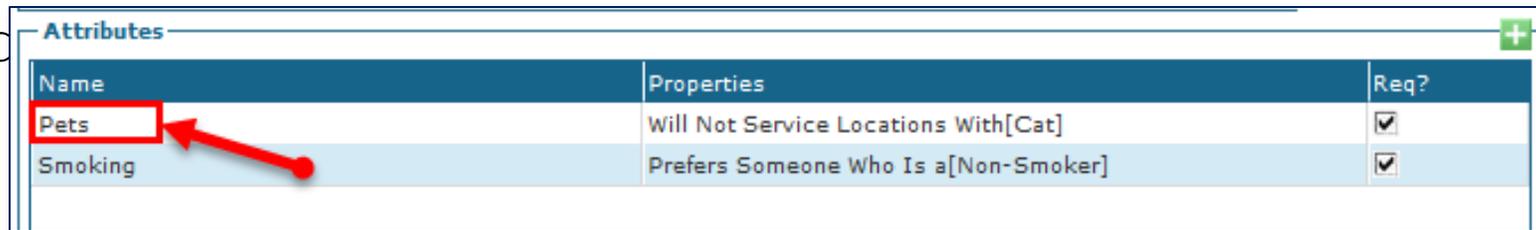
Requirement

Save Close

# Deleting Attributes

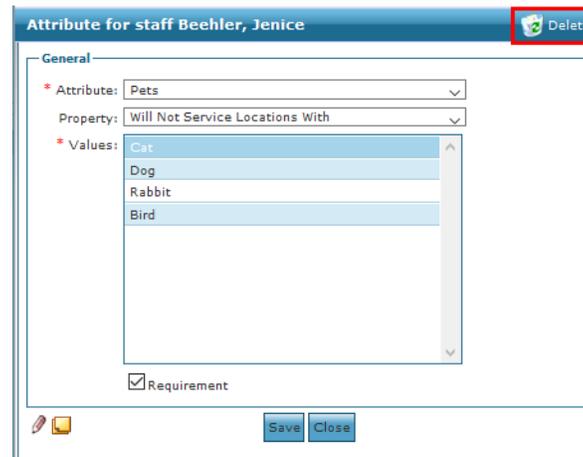
To delete a Staff Attribute

1. Double click



Name	Properties	Req?
Pets	Will Not Service Locations With[Cat]	<input checked="" type="checkbox"/>
Smoking	Prefers Someone Who Is a[Non-Smoker]	<input checked="" type="checkbox"/>

2. Click Delete.



Attribute for staff Beehler, Jenice Delete

General

\* Attribute: Pets

Property: Will Not Service Locations With

\* Values: Cat, Dog, Rabbit, Bird

Requirement

Save Close



# Deleting Attributes (cont'd)

3. Click **Yes** to confirm the deletion.



4. Click **Save**.

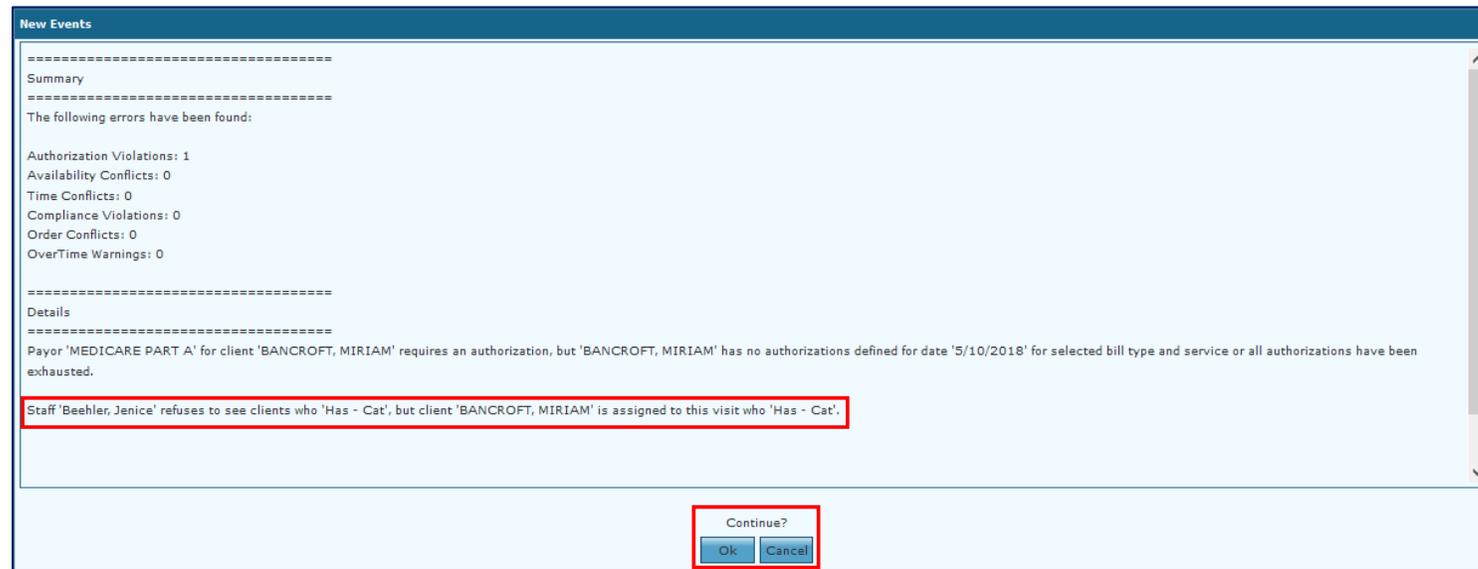
# Scheduling with Attributes

- ▶ Supported Scheduling Locations
  - Attributes can be applied when using the Advanced Search option at the following locations:
    - *Permanent Schedule* screen, when clicking **Apply Changes** and **Apply to all Templates**.
    - *New Events* screen, when clicking **Confirm**.
    - *Schedule Detail* screen, when clicking **Save**.
    - *Schedule Overview > (Mass) Edit Staff* screen, when clicking **Save**.

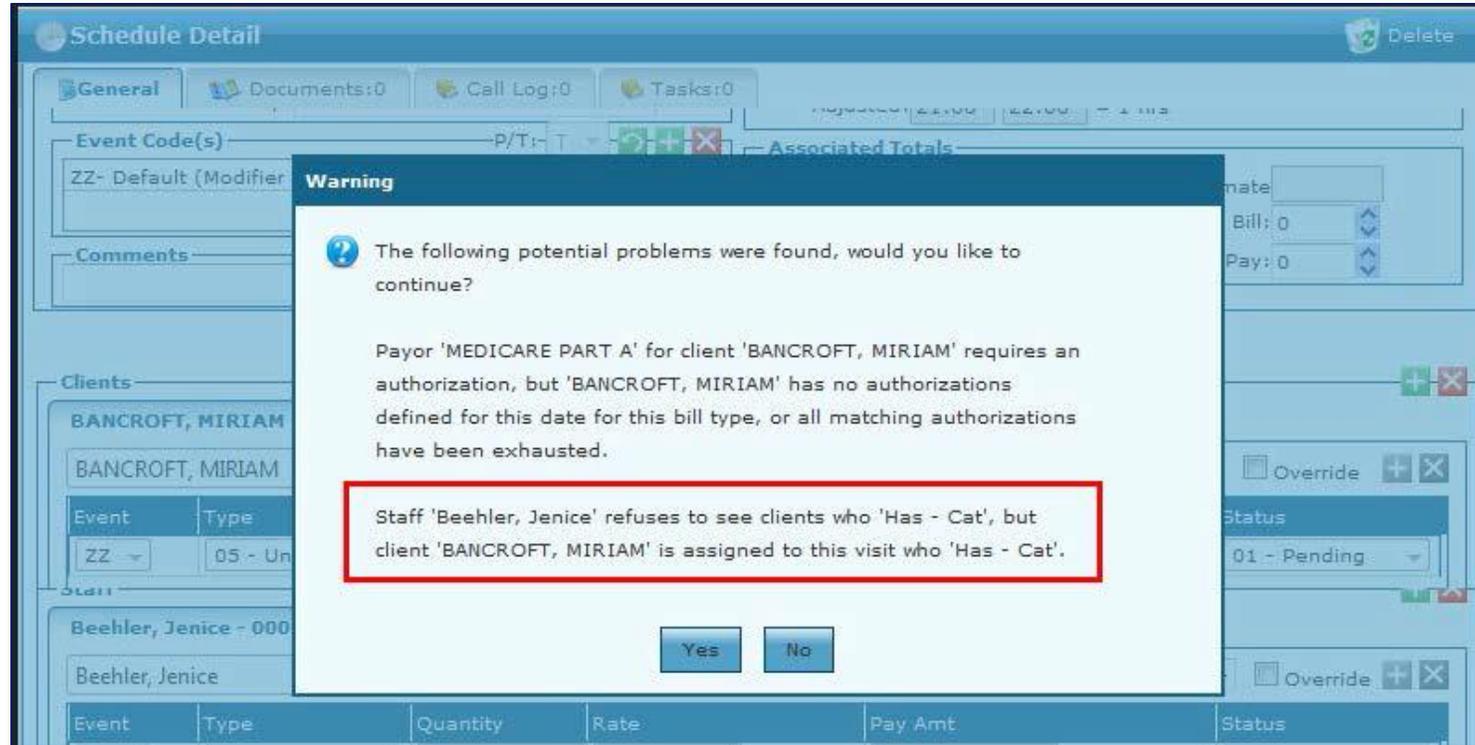


# Scheduling with Attributes (cont'd)

- ▶ A schedule with incompatible attributes can be overridden at the *New Events*, *Schedule Detail* and *Mass Editing* screens by a user with the correct security permissions.



# Scheduling with Attributes (cont'd)



**Warning**

The following potential problems were found, would you like to continue?

Payor 'MEDICARE PART A' for client 'BANCROFT, MIRIAM' requires an authorization, but 'BANCROFT, MIRIAM' has no authorizations defined for this date for this bill type, or all matching authorizations have been exhausted.

Staff 'Beehler, Jenice' refuses to see clients who 'Has - Cat', but client 'BANCROFT, MIRIAM' is assigned to this visit who 'Has - Cat'.

Yes No

The background interface shows a 'Schedule Detail' window with tabs for 'General', 'Documents:0', 'Call Log:0', and 'Tasks:0'. It includes fields for 'Event Code(s)', 'P/T: T', and 'Associated Totals'. A 'Clients' section lists 'BANCROFT, MIRIAM' and 'Beehler, Jenice - 000'. A table at the bottom shows columns for 'Event', 'Type', 'Quantity', 'Rate', 'Pay Amt', and 'Status'.



# Scheduling with Attributes (cont'd)

The screenshot displays the Sandata Scheduling interface. In the background, there is a table of client schedules. Overlaid on this is a 'Staff' selection window where 'Beehler, Jenice' is selected. A 'Warning' dialog box is open, containing a red-bordered text area with the following message:

Staff 'Beehler, Jenice' refuses to see clients who 'Has - Cat', but client 'BANCROFT, MIRIAM' is assigned to this visit who 'Has - Cat'.vbNewLine

Staff 'Beehler, Jenice' refuses to see clients who 'Has - Cat', but client 'BANCROFT, MIRIAM' is assigned to this visit who 'Has - Cat'.vbNewLine

Staff 'Beehler, Jenice' refuses to see clients who 'Has - Cat', but client 'BANCROFT, MIRIAM' is assigned to this visit who 'Has - Cat'.vbNewLine

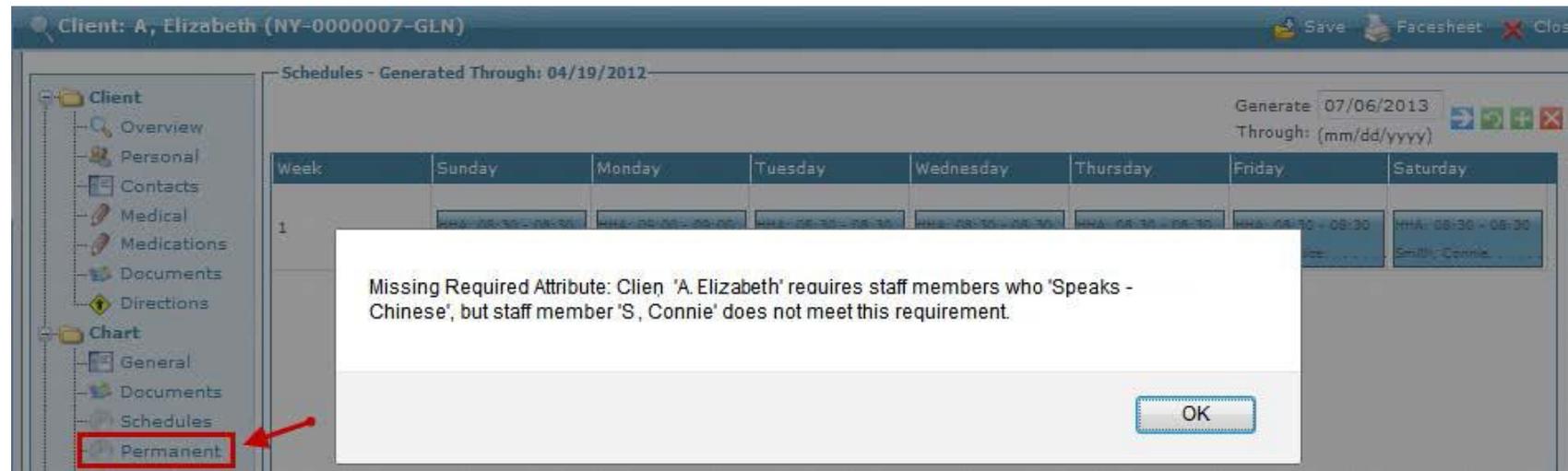
Staff 'Beehler, Jenice' refuses to see clients who 'Has - Cat', but client 'BANCROFT, MIRIAM' is assigned to this visit who 'Has - Cat'.vbNewLine

At the bottom of the warning dialog are 'Yes' and 'No' buttons. A red callout bubble points to the warning text with the text: 'The warning message repeats for each schedule selected.'



# Scheduling with Attributes (cont'd)

Schedules cannot be overridden at the *Permanent Schedule Template* screen.



# Scheduling with Attributes: Advanced Search

When scheduling using the **Advanced Search** function, the **Attributes** checkbox is selected to narrow the results of potential matches. The search results are listed in order of closest match to the client's attributes.

The screenshot shows the 'Staff Search' window with the following search filters:

- Attributes
- Client: Moose, Maggie
- Company: 4490- CT Home Care Agei
- Location: H- Hartford
- Agency: [Empty]
- Team: [Empty]
- Status: 02- Active
- Reason: [Empty]
- Coord: [Empty]
- Service: Personal Care Services
- Manager: [Empty]
- Position: [Empty]
- Internal Staff
- Language: [Empty]
- Availability  Prev Worked
- Date: 05/10/2018
- From: [Empty] To: [Empty]
- Working in Zip/Region Tolerance 60\_\_ minutes

The search results table is as follows:

Name	Agency ID	Position	Status	Hired	Rank	Phone#	Hours Worked	Zip Code	County
Ackland, Robert	000987641	RN	02	01/01/2016	[Blue Bar]				
Charland, Cammie	000123476	RN	02	05/01/2014	[Blue Bar]				
Crandell, Melisa	000123460	RN	02	05/01/2014	[Blue Bar]				
Rigg, Arminda	000123459	HHA	02	05/01/2014	[Blue Bar]				



# Let's Review

- ▶ Accessing the Staff Module and Search Filters
- ▶ Entering New Staff:
  - New Staff Wizard and minimum data required
- ▶ Accessing and viewing the Staff Profile screens
- ▶ System Administrator user and permissions:
  - Assign Security permissions to users
  - Manually confirm visits
- ▶ Coordinators and Manager permissions



# Demonstration

Search for Staff

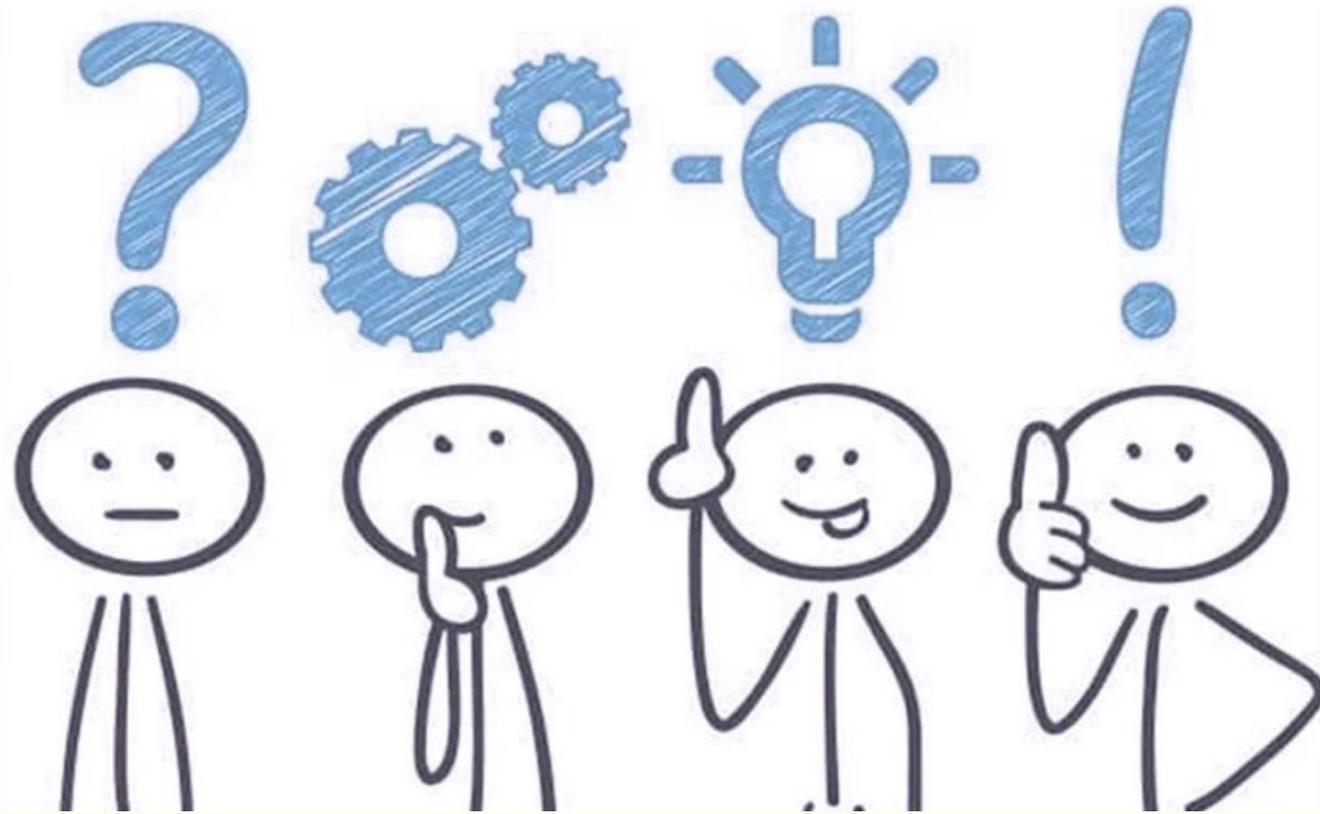
Enter New Staff

Change Staff Status

Adding Staff Exclusions & Attributes



# Questions...



# How to Stay Connected

We look forward to working with you.

Please do not hesitate to reach out with questions or comments as we move forward.

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