

The background features a hand in a white lab coat pointing at a futuristic digital interface. The interface consists of various icons and data visualizations, including a large circular gauge, a gear, a first aid kit, a person icon, a syringe, a magnifying glass, a pill, and a network diagram. The overall theme is healthcare and technology.

Sandata

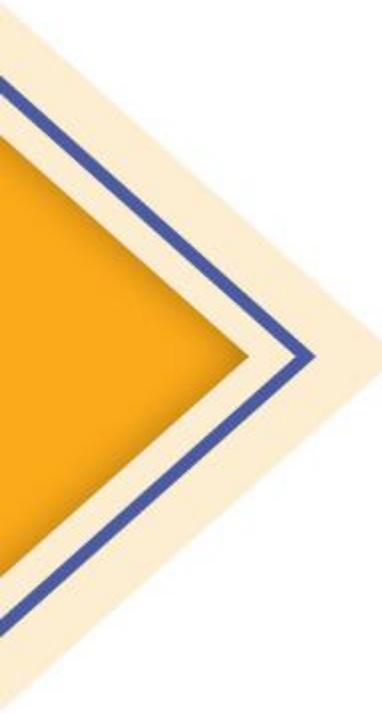
Get more right from the start

Connecticut Department of Mental Health and
Addiction Services

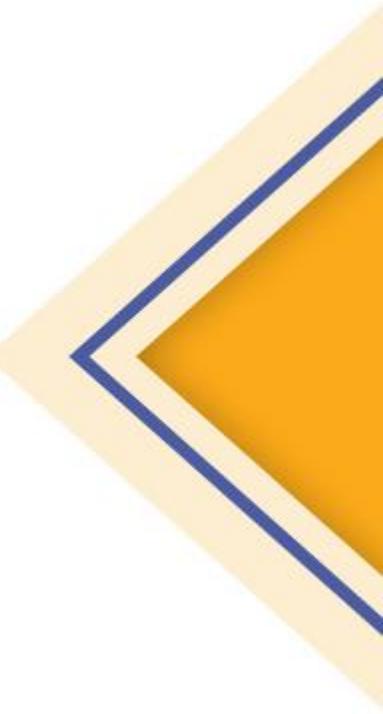
Electronic Visit Verification (EVV) Provider Training
Scheduling Module

Agenda

- Searching for Schedules
- Creating Schedules
- Editing Schedules

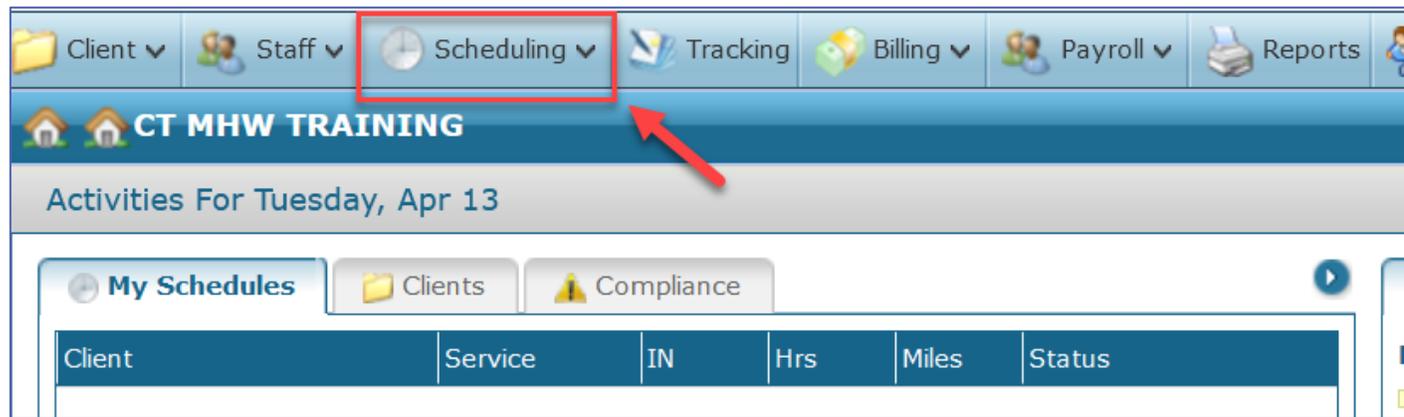


SCHEDULING OVERVIEW SCREEN



Scheduling Overview

- ▶ Click **Scheduling** on the menu bar to open the **Scheduling Overview** screen.
- ▶ The **Scheduling Overview** screen is used to view or edit an existing schedule.



Search Filters

- ▶ Client or Staff
- ▶ Branch Location
- ▶ Coordinator, Managers
- ▶ Status
- ▶ Service or Position
- ▶ Date Range
- ▶ Days of the Week
- ▶ Unassigned (no staff selected)

The screenshot shows the 'Scheduling: Overview' application window. The search filters are organized into several sections:

- Client/Staff:** Text input fields for 'Client:' and 'Staff:' with search and clear icons.
- Admission:** A dropdown menu.
- Company:** A dropdown menu.
- Location:** A dropdown menu.
- Admit Type:** A dropdown menu.
- Coordinator:** A dropdown menu.
- Region:** A dropdown menu.
- Status:** A dropdown menu.
- Primary Payor:** A dropdown menu.
- Clinical Manager:** A dropdown menu.
- Staff Manager:** A dropdown menu.
- Position:** A dropdown menu.
- Agency:** A dropdown menu.
- Service:** A dropdown menu.
- Event:** A dropdown menu.
- Team:** A dropdown menu.
- MRN #:** A text input field.
- Payor #:** A text input field.
- Date Range:** 'Date From:' and 'Date To:' fields, both set to '03/26/2021'.
- Time In/Out:** 'Time In:' and 'Time Out:' fields.
- Days of the Week:** A row of checkboxes for Mo, Tu, We, Th, Fr, Sa, Su.
- Santrax Calls:** A checkbox.
- Show Selected:** A checkbox.
- Unassigned:** A checkbox.
- Hide Cancelled Events:** A checked checkbox.
- Filter For Client *or* Staff:** A checkbox.

On the right side, there is a calendar for March 2021. The date 26 is highlighted. The calendar table is as follows:

S	M	T	W	T	F	S
28	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	9	10



Sorting Results

- ▶ Clicking any column header sorts the results by that column
- ▶ Clicking a second time reverses the sort order

Date	Coordinator	Client ▲	Chart ID	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TZ	HrsP
02/05/18-Mon		Adams, Arthur	NY-0201726-MCD				HHA	DEF	P	09:00	16:00	P	E	7
02/05/18-Mon		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF	P	12:00	17:00	P	E	5
02/06/18-Tue		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF	P	12:00	17:00	P	E	5
02/05/18-Mon		Aranda, Tommy	HOU-0201682-SC	Banner, Bruce	P	HHA	17HC	DEF	P	14:30	14:45	P	C	0.25
02/06/18-Tue		Aranda, Tommy	HOU-0201682-SC	Banner, Bruce	P	HHA	17HC	DEF	P	14:30	14:45	P	C	0.25
02/05/18-Mon	525-Brown	Ash, Ally	NY-0201723-MCD	Banner, Bruce	P	HHA	HSK	DEF	P	12:00	14:00	P	E	2
02/06/18-Tue	525-Brown	Ash, Ally	NY-0201723-MCD	Banner, Bruce	P	HHA	HSK	DEF	P	12:00	14:00	P	E	2
02/06/18-Tue		Aston, Amy	NY-0201725-MCD	John, Jimmy	P	HHA	HSK	DEF	P	11:00	16:00	P	E	5
02/05/18-Mon		Brill, Joyce	HOU-0201610-TC	Bartlett, Jedd	P	HHA	17HC	DEF	P	19:00	22:00	P	C	3
02/06/18-Tue		Brill, Joyce	HOU-0201610-TC	Cook, Adele	P	HHA	17HC	DEF	P	07:00	09:00	P	C	2
02/06/18-Tue		Brill, Joyce	HOU-0201610-TC	Bartlett, Jedd	P	HHA	17HC	DEF	P	19:00	22:00	P	C	3



Schedule Status Colors

- ▶ In the results list, the Status column will be highlighted with a status color.

Page size: 100 160 items in 2 pages

Date	Coordinator	Client	Chart ID	Staff	P/1	Pos	Service	EC	P/1	INP	OUTP	P/T	TZ	HrsP	IN	OUT	Hrs	Supplies	Status
03/01/16-Tue		Martin, Christ	HOU-0201603-TCB	Coleman, Bill	P	HHA	17HC	DEF	P	07:00	08:00	P	C	1			1	0	10- Cancelled
03/01/16-Tue		Castalano, M:	HOU-0201607-TCB	Campbell, An	P	HHA	17C	DEF	P	07:30	08:30	P	C	1	07:30	08:30	1	0	02- Confirmed
03/01/16-Tue		Matin, Gloria	HOU-0201608-TCB	Edwards, Este	P	HHA	17HC	DEF	P	07:30	08:30	P	C	1			1	0	09- Hold
03/01/16-Tue		Cain, Madelin	HOU-0201626-TCB	Pearce, Erica	P	HHA	17C	DEF	P	07:30	10:00	P	C	2.5			2.5	0	01- Pending
03/01/16-Tue		Brill, Joyce	HOU-0201610-TCB	Rivera, Olivia	P	HHA	HHA	DEF	P	08:00	09:00	P	C	1	07:45	08:45	1	0	02- Confirmed

Status	Color
Pending	Grey
Confirmed	Green
Hold	Orange
In Progress	Pink
Cancelled	Red



Opening the Schedule Detail

To open the Schedule Detail:

- Double-click the schedule line item in the **Results –OR–**
- Right-click on a schedule line and choose **Open**.

Date	Coordinator	Client ▲	Chart ID	Staff	P/T	Pos	Service	EC
02/05/18-Mon		Adams, Arthur	NY-0201726-MCD				HHA	DEF
02/05/18-Mon		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF
02/06/18-Tue		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF
02/05/18-Mon		Aranda, Tommy	HOU-0201682-SC	Banner, B				
02/06/18-Tue		Aranda, Tommy	HOU-0201682-SC	Banner, B				
02/05/18-Mon	525-Brown	Ash, Ally	NY-0201723-MCD	Banner, B				
02/06/18-Tue	525-Brown	Ash, Ally	NY-0201723-MCD	Banner, B				
02/06/18-Tue		Aston, Amy	NY-0201725-MCD	John, Jim				
02/05/18-Mon		Brill, Joyce	HOU-0201610-TC	Bartlett,				
02/06/18-Tue		Brill, Joyce	HOU-0201610-TC	Cook, Adere	P	HHA	HSK	DEF

- Open
- Select all
- Unselect all
- View ▶
- Edit ▶
- Copy forward
- Refresh rates



Viewing Schedule Detail

The screenshot shows the 'Schedule Detail' window with the following sections and callouts:

- Call Details:** Points to the 'General' tab and the 'Date' field (02/05/2018 - Mon).
- Service:** Points to the 'Service' dropdown (17C- PAS Family L1).
- Event Code:** Points to the 'Event Code(s)' dropdown (DEF- Default).
- Client Details:** Points to the 'Clients' section header and the client name 'Denzler, Doug - HOU0201636-TCB'.
- Staff Details:** Points to the 'Staff' section header and the staff name 'Hughes, Glen - 012049-HHA'.
- Status:** Points to the 'Status' dropdown (02- Confirmed).
- Schedule Times:** Points to the 'Times' section, specifically the 'Proposed' time slot (10:00 - 11:15).
- Actual EVV Call Times:** Points to the 'Adjusted' time slot (09:58 - 11:15).

Associated Totals:

Carfare:	\$0.00	TT Estimate:	
Miles:	0.00	TT Bill:	0
		TT Pay:	0

Clients Table:

Event	Type	Quantity	Rate	Bill Amt	Copay	Status
DEF	05 - Unit	5.00	\$4.86	\$24.30		02 - Confirmed

Staff Table:

Event	Type	Quantity	Rate	Pay Amt	Status
DEF	05 - Unit	5	\$0.00	\$0.00	02 - Confirmed



Demonstration – Scheduling overview

Search Filters

Sorting Search Results

Schedule Details



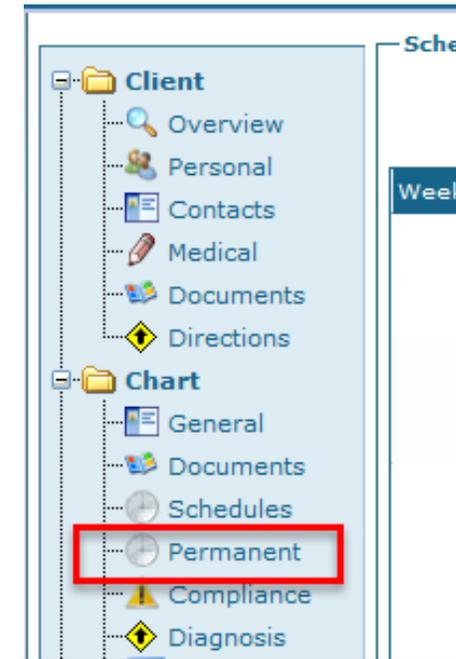
Creating New Schedules

- Permanent Templates
- New Events



Permanent Schedule Templates

- ▶ Supports a variety of schedule patterns
 - Every day, Every weekday, Every Other week, different workers on different days.....
- ▶ From the Client record, click the Permanent link
- ▶ Click the Green Plus in the upper-right to add a schedule pattern week
- ▶ Right-click under any day to add a schedule template



Schedules - Generated Through: 02/18/2018

Generate 02/25/2018 (mm/dd) Through: /yyyy

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	HHA: 09:00 - 16:00 Brooks, Dawn		HHA: 09:00 - 16:00 Brooks, Dawn				



Permanent Schedule Templates

- ▶ Fill in the pattern details and 'apply changes' to save

Schedule Details for: Sunday, Week 1 Event #2

Service: HHA

Event Code: HR- Hourly

Shift Group: PARTNERS IN CARE No Shift

Time In: 12:33

Time Out: 20:33

Miles: 0.00

Supplies: \$0.00

Bill Type: 01- Hourly

Pay Type: 01- Hourly

Staff:

Comments:

Apply Changes Cancel Changes Delete Template Apply To All Templates

- ▶ Right-click on the saved template to copy to additional days

Week	Saturday	Sunday	Monday	Tuesday	Wednesday
1	HHA: 09:00 - 17:00 ABBOTT, MARGARET				
2					



Permanent Schedule Manual Generation

On a client by client basis, you will be able to generate schedules past the normal pattern to capture changes:

E.g. Regular staff member tells you that she will be away for the next month, you know the replacement aide, but you only have schedules for the next 2 weeks, Generate the schedules for just that client capture the change and the system will save it

1. This **Generate Through** date indicates schedules exist up to that date.
2. To generate additional schedules (for iust this client), modify the 'Generate Through' field and click th

Week	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		AD: 09:00 - 11:00 Beane, Billy.....			AD: 09:00 - 11:00 Beane, Billy.....		
2							

Blank week indicates every other week pattern.



Demonstration – Permanent templates

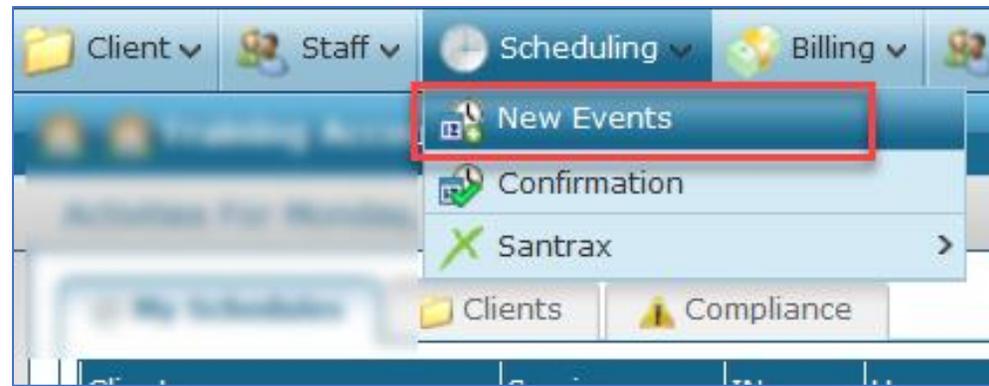
Creating Permanent Schedule Template

Edit a Permanent Schedule Template



New Events

- ▶ Creating schedules is done from the New Events Screen
- ▶ To access the New Events screen, hover over the **Scheduling** icon and then click **New Events**.



New Events Screen

Information on the screen is best populated from left to right and top to bottom.

- Frequency (single event, days of the week)
- Dates
- Client
- Staff (filtered based on Service and Client)
- Service (including Bill and Pay Type)
- Times (military time)

New Events Clear Filter Add

Frequency

PRN Visits
 Single Event
 Ordered Frequency
 Recurring Every...
0
Days
 By Weekday
 Mon Fri
 Tue Sat
 Wed Sun
 Thu

Date(s)
Date: 03/17/2021

Service
* Service:
* Bill Type:
* Pay Type:

Times
Times: Bill Hrs: Pay Hrs:

*** Client(s)**

Staff

Payor

Comments

*** Event Code(s)**
ZZ-Default (Modifierspecified in billing)

Status, Company, Etc.
Status: 01- Pending
* Location:
* Company:
PoS: 01- Patients Home
* Shift Group:
PoS Direction: To From N/A

Authorizations

Auth Ref No	Service	EC	Max	Remaining	Begin Date	End Date	Limit By	Ma
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New Events Process

1. Select the Frequency
2. Select the date or date range to be scheduled

Frequency

PRN Visits

Single Event

Ordered Frequency

Recurring Every...

0

Days

By Weekday

Mon Fri

Tue Sat

Wed Sun

Thu

Date(s)

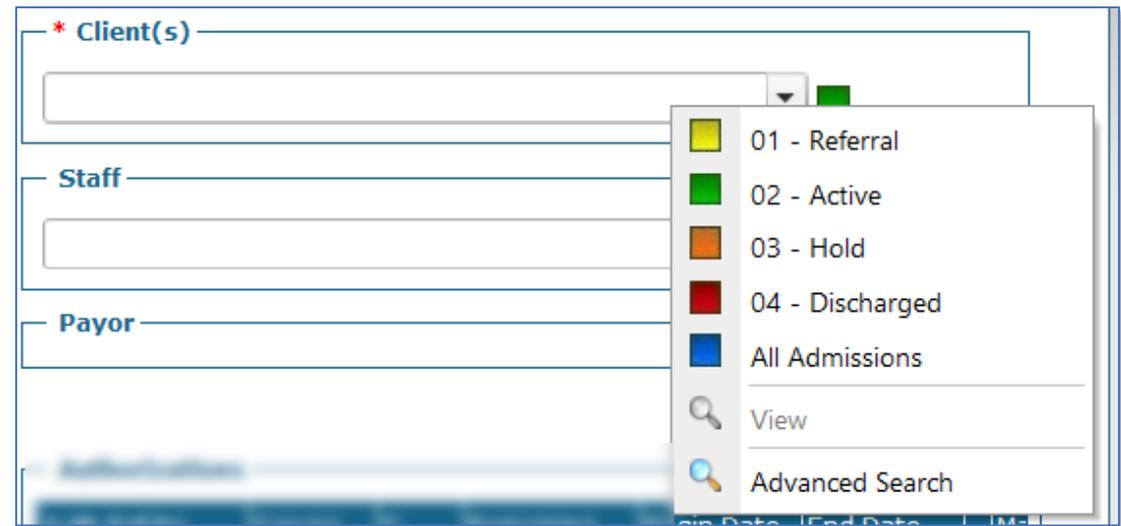
Begin:

End:



New Events Process

3. Select a **Client** (Service, Bill type and Pay type will populate).
 - ▶ Type the name into the Client field.
 - ▶ Click the status square next to the field to use the **Advanced Search** option.



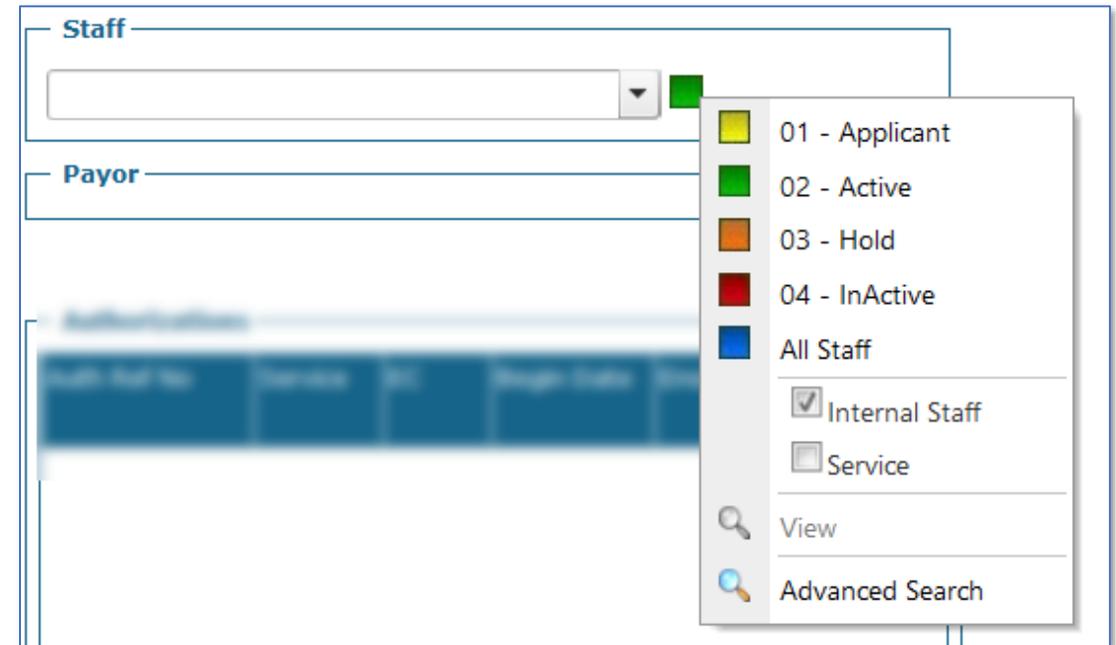
The screenshot shows a software interface with a search dropdown menu open. The dropdown menu is titled "* Client(s)" and contains the following options:

- 01 - Referral (Yellow square)
- 02 - Active (Green square)
- 03 - Hold (Orange square)
- 04 - Discharged (Red square)
- All Admissions (Blue square)

Below the status options, there are two search options: "View" (with a magnifying glass icon) and "Advanced Search" (with a magnifying glass icon).

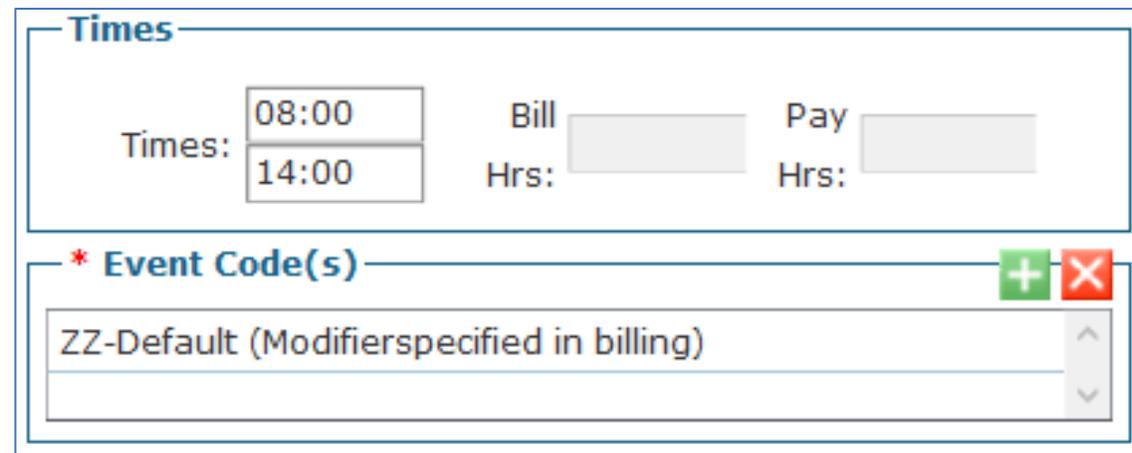
New Events Process

4. Select a **Staff** (caregiver)
 - ▶ Type the name into the Staff field.
 - ▶ The Staff field can be left blank if the caregiver has not yet been identified.
 - ▶ Click the status square next to the field to use the Advanced search options.



New Events Process

5. Enter the start and end times.
6. Enter the Event Code, if needed, selecting the Event Code matching the authorization.
7. Remove unwanted Event Codes by selecting and clicking the red X to remove.



The screenshot shows a software interface with two main sections. The top section, titled "Times", contains a "Times:" label followed by two input boxes containing "08:00" and "14:00". To the right of these are "Bill Hrs:" and "Pay Hrs:" labels, each followed by an empty input box. The bottom section, titled "* Event Code(s)", features a list box containing the text "ZZ-Default (Modifierspecified in billing)". To the right of the list box are a green "+" button and a red "X" button. The list box has a vertical scrollbar on its right side.



New Events Process

8. After all options have been set, click **Add** to preview the schedules.



- ▶ Boxes next to schedule line indicates if schedules have conflicts (e.g. selected staff has overlapping assignment)

	Date	Client	Staff	Service	EC	IN	OUT	TZ	Duration	Status
<input type="checkbox"/>	2/5/2018-Mon	Adams, Arthur	Bartlett, Jedd	HHA	DEF-Default	10:00	15:00		5	01- Pending
<input type="checkbox"/>	2/7/2018-Wed	Adams, Arthur	Bartlett, Jedd	HHA	DEF-Default	10:00	15:00		5	01- Pending
<input type="checkbox"/>	2/8/2018-Thu	Adams, Arthur	Bartlett, Jedd	HHA	DEF-Default	10:00	15:00		5	01- Pending

9. If there are *no* conflicts, click **Commit** to save schedules to the database.



Demonstration – New Events

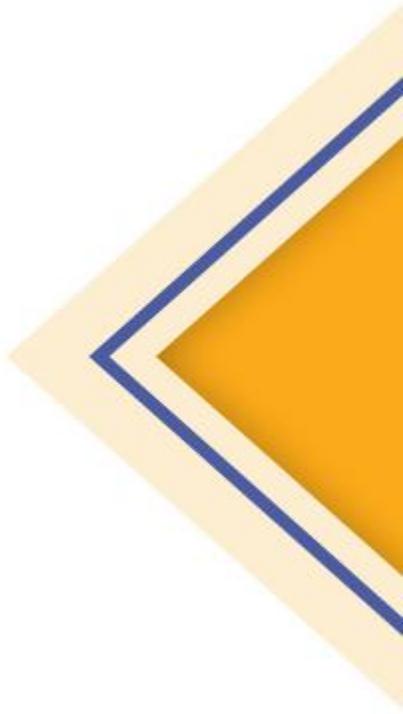
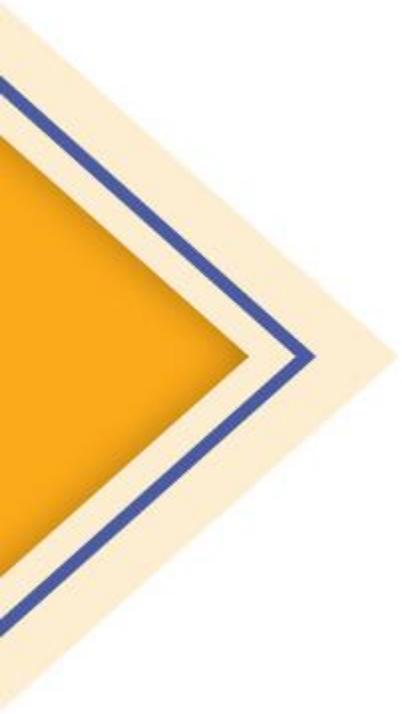
Creating Schedules

Checking for Conflicts

Committing Schedules



Editing Schedules



Individual Schedule Edit – Times

- ▶ Opening the **Schedule Detail** allows for editing the individual schedule.
- ▶ To adjust the schedule time, update the **Proposed Time** fields and Save.

The screenshot displays the 'Schedule Detail' window with the following information:

- General:** Date: 03/30/2021 - Tue; Service: 17HC- Personal Assist Svcs; Company: Acme Homecare; Location: New York; PoS: [dropdown]; Shift Group: New York No Shift; PoS Direction: [radio buttons];
- Status:** 01- Pending; Cancel: [button];
- Times (highlighted in red):** Proposed: 07:00 - 13:00 = 6 hrs; Santrax: [input] = 6 hrs; Adjusted: 07:00 - 13:00 = 6 hrs; P/T: P [dropdown];
- Associated Totals:** Carfare: \$0.00; Miles: 0.00; TT Estimate: [input]; TT Bill: 0; TT Pay: 0;
- Event Code(s):** EC1- Special; P/T: P [dropdown];
- Comments:** [text area];
- Clients:** Jane, Mary - NYC0201517-MCD; Bill As: 01- Hourly; Override: [checkbox];

Event	Type	Quantity	Rate	Bill Amt	Copay	Status
EC1	01 - Hourly	0.00	\$0.00	\$0.00		01 - Pending
- Staff:** Bryant, Jean - 000012081-HHA; P/T: P [dropdown]; Pay As: 01- Hourly; Override: [checkbox];

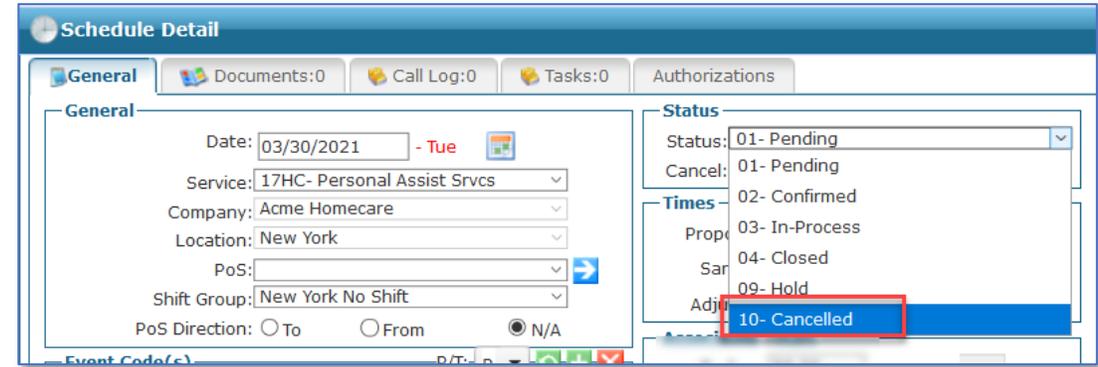
Event	Type	Quantity	Status
EC1	01 - Hourly	6.00	01 - Pending

Buttons: Save, Close



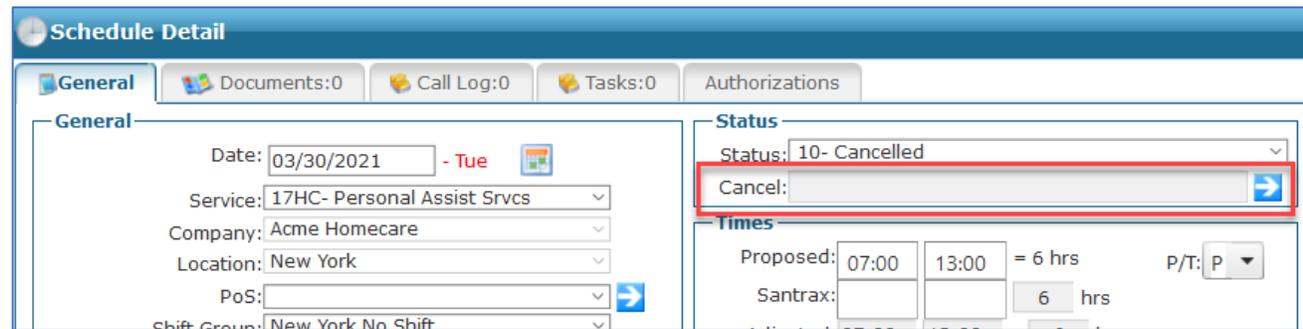
Individual Schedule Edit – Changing Caregiver

- ▶ To change the scheduled caregiver:
 1. Change the status to **Cancelled**.



The screenshot shows the 'Schedule Detail' window with the 'General' tab selected. The 'Status' dropdown menu is open, displaying a list of status options: 01- Pending, 02- Confirmed, 03- In-Process, 04- Closed, 09- Hold, and 10- Cancelled. The '10- Cancelled' option is highlighted in blue. The 'Cancel:' field is empty, and the 'Status:' field shows '01- Pending'.

2. Click the arrow next to the *Cancel* field, choose the appropriate reason code and click Save.

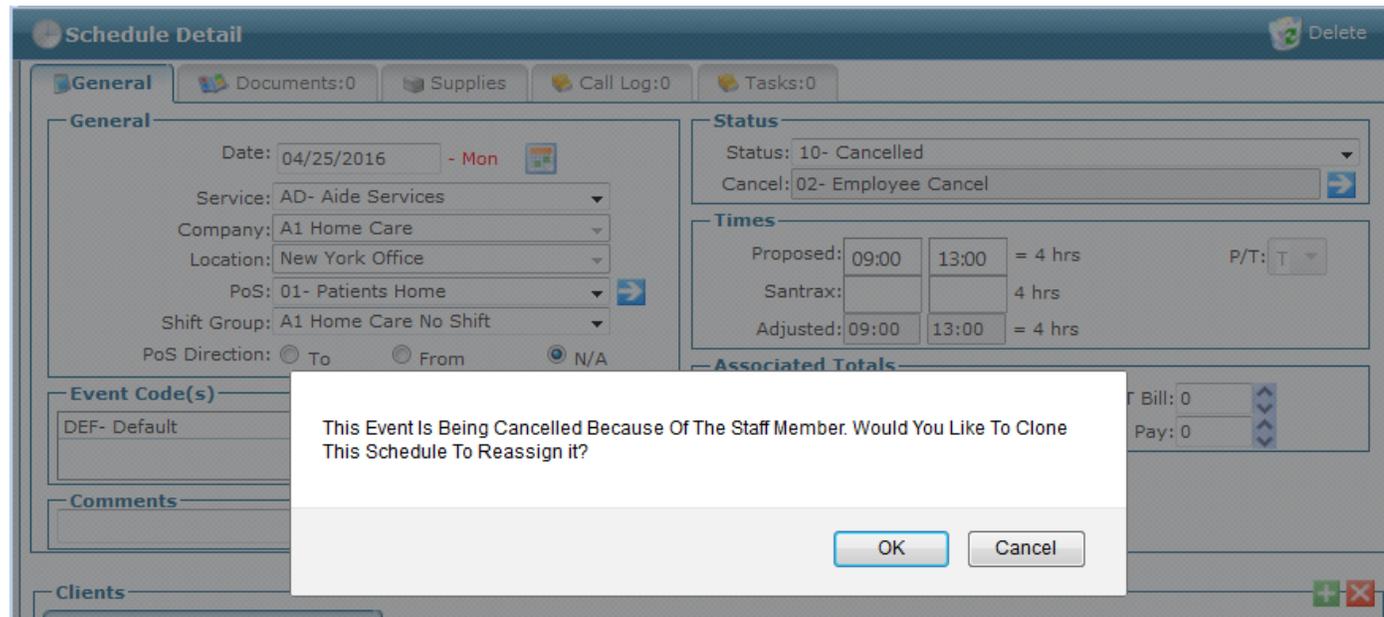


The screenshot shows the 'Schedule Detail' window with the 'General' tab selected. The 'Cancel:' dropdown menu is open, displaying a list of reason codes. The 'Status:' field now shows '10- Cancelled'. The 'Cancel:' field is highlighted with a red box, and the 'Status:' field is also highlighted with a red box. The 'Times' section shows 'Proposed: 07:00 13:00 = 6 hrs' and 'Santrax: 6 hrs'.



Individual Schedule Edit – Changing Caregiver

3. Click **OK** when prompted to Clone the schedule to Reassign it



Individual Schedule Edit – Changing Caregiver

4. Click **OK** to view the new schedule to add the replacement caregiver and click **Save**. – OR
–
Click **Save** without selecting a replacement caregiver if not yet known.

The screenshot displays the 'Schedule Detail' window with the following sections:

- General:** Date: 03/30/2021 - Tue; Service: 1021Z- Personal Care Services; Company: Acme Homecare; Location: New York; PoS: [dropdown]; Shift Group: New York No Shift; PoS Direction: To, From, N/A (selected).
- Status:** Status: 01- Pending; Cancel: [button].
- Times:** Proposed: 07:00 - 09:00 = 2 hrs; Santrax: [input] 2 hrs; Adjusted: 07:00 - 09:00 = 2 hrs; P/T: P.
- Associated Totals:** Carfare: \$0.00; Miles: 0.00; TT Estimate: [input]; TT Bill: 0; TT Pay: 0.
- Event Code(s):** ZZ- Default (Modifiers specified in billing).
- Staff:** A red arrow points to a '+' icon in the top right corner of this section.

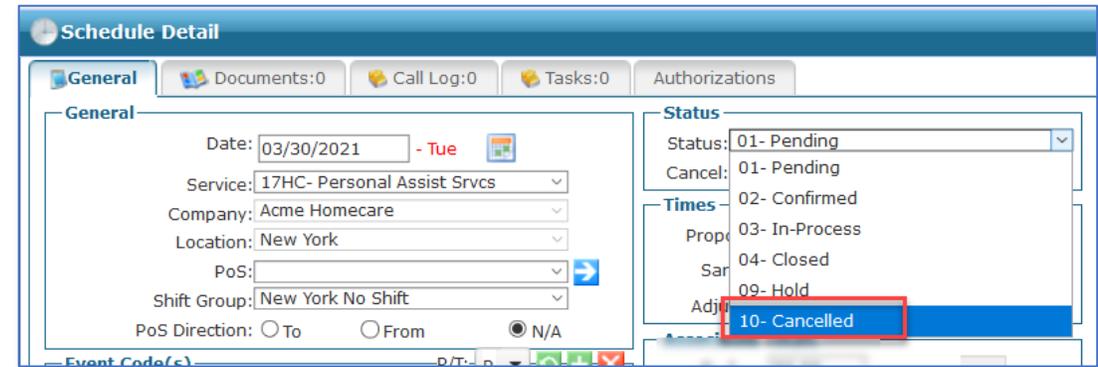
Buttons at the bottom include 'Save' and 'Close'.



Individual Schedule Edit – Quick Cancel

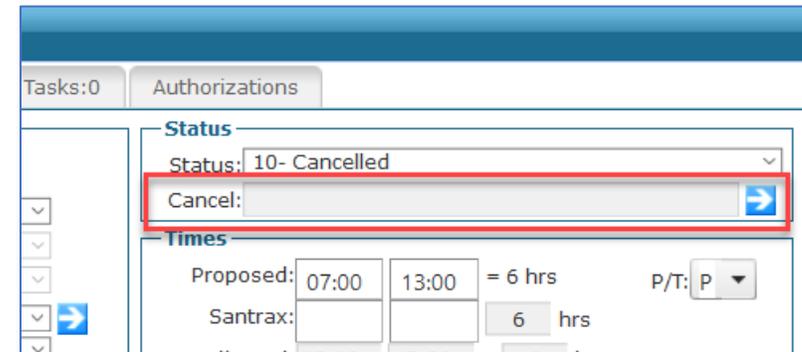
To cancel a schedule due to a client reason:

1. Change the schedule status to **Cancelled**.



The screenshot shows the 'Schedule Detail' window with the 'Status' dropdown menu open. The '10- Cancelled' option is highlighted in blue and enclosed in a red box. Other options visible include '01- Pending', '02- Confirmed', '03- In-Process', '04- Closed', and '09- Hold'. The 'General' tab is active, showing fields for Date (03/30/2021), Service (17HC- Personal Assist Svcs), Company (Acme Homecare), Location (New York), PoS, Shift Group (New York No Shift), and PoS Direction (N/A).

2. Click the arrow next to the *Cancel* field, select the appropriate reason code and click Save.



The screenshot shows the 'Schedule Detail' window with the 'Cancel' dropdown menu open. The dropdown is highlighted with a red box and contains a reason code. The 'Status' field is set to '10- Cancelled'. The 'Times' section shows Proposed: 07:00 - 13:00 = 6 hrs and Santrax: 6 hrs. The 'P/T' dropdown is set to 'P'.



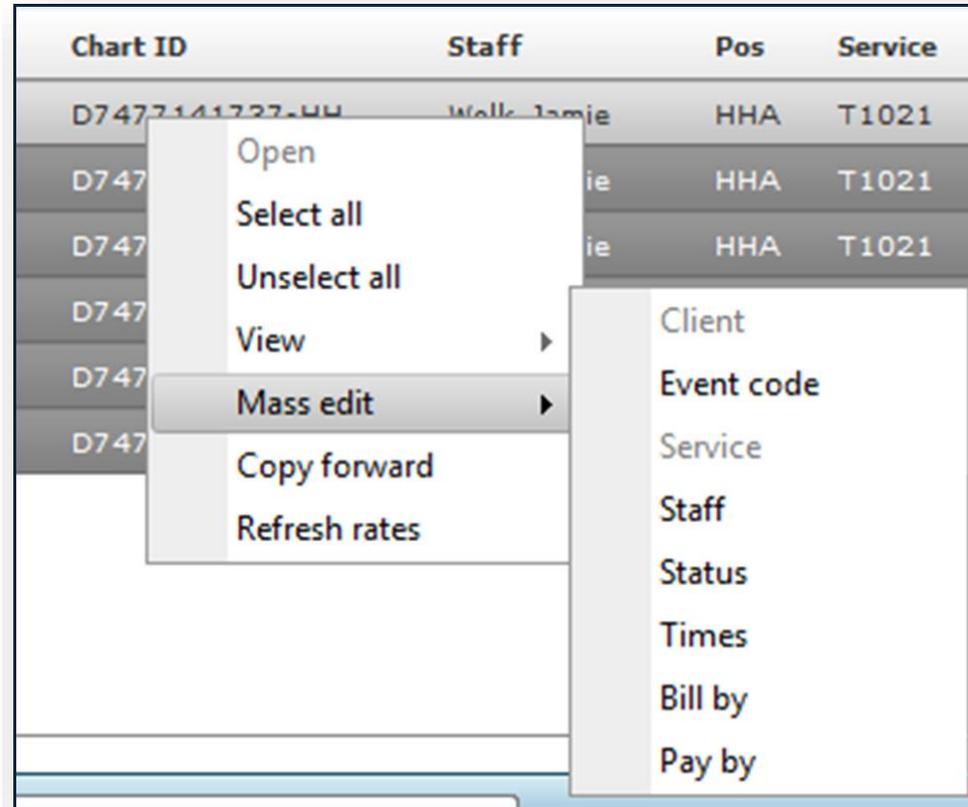
Mass Edit – Times, Staff, Event Codes, Status

Allows for quick editing of schedules individually or as a group.

- ▶ Use the filters to focus on the schedules that need to be updated.
- ▶ Right-click on schedules and choose **Select All** or click the schedules to be edited. (Ctrl + click to select multiple).
- ▶ Right-click again and choose **Mass Edit**
- ▶ Mass Edit options displayed are: **Times, Staff, Event Codes, Bill Type** or **Pay Type**.
- ▶ Select the appropriate choice and follow the wizard.



Mass Edit



The screenshot shows a table with four columns: Chart ID, Staff, Pos, and Service. A context menu is open over the table, with the 'Mass edit' option highlighted. A sub-menu is also open, listing various fields that can be edited: Client, Event code, Service, Staff, Status, Times, Bill by, and Pay by.

Chart ID	Staff	Pos	Service
D7472141727-HH	Walk, Jamie	HHA	T1021
D747	ie	HHA	T1021
D747	ie	HHA	T1021
D747			
D747			
D747			

- Open
- Select all
- Unselect all
- View
- Mass edit
- Copy forward
- Refresh rates

- Client
- Event code
- Service
- Staff
- Status
- Times
- Bill by
- Pay by



Mass Edit – Service

- ▶ The Service for schedules can also be edited as a group instead of individually
- ▶ From the Scheduling Overview screen, use the filters to identify the schedules to be edited.
- ▶ The current Service must be selected as one of the filter options
- ▶ Once the schedules are displayed, right-click to ‘Select All.’
- ▶ Right-click again and choose *Mass Edit > Service*.
- ▶ Select the new service, click Save and choose the appropriate reason for the change.



Schedules and Client Status

Changing a client's status to **Hold** or **Discharged** will cancel previously scheduled encounters.

- Schedules will be cancelled from the effective date forward.
- Staff will be removed and available for re-assignment



Schedules and Client Status

Changing a client's status from **Hold** to **Active** will reactivate previous cancelled schedules.

- Schedules can be rebuilt based on any new or revised authorizations.
- If existing schedules are changed from **Cancelled** to **Pending** status (with Mass Edit), staff will be blank.



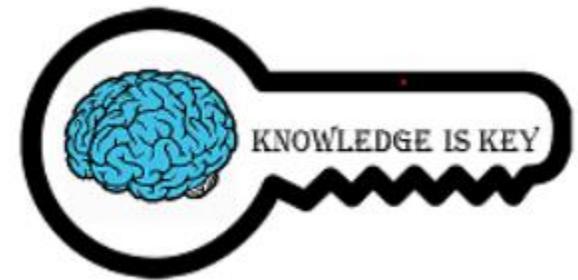
DEMONSTRATION – EDIT SCHEDULES

Mass Edit Tool

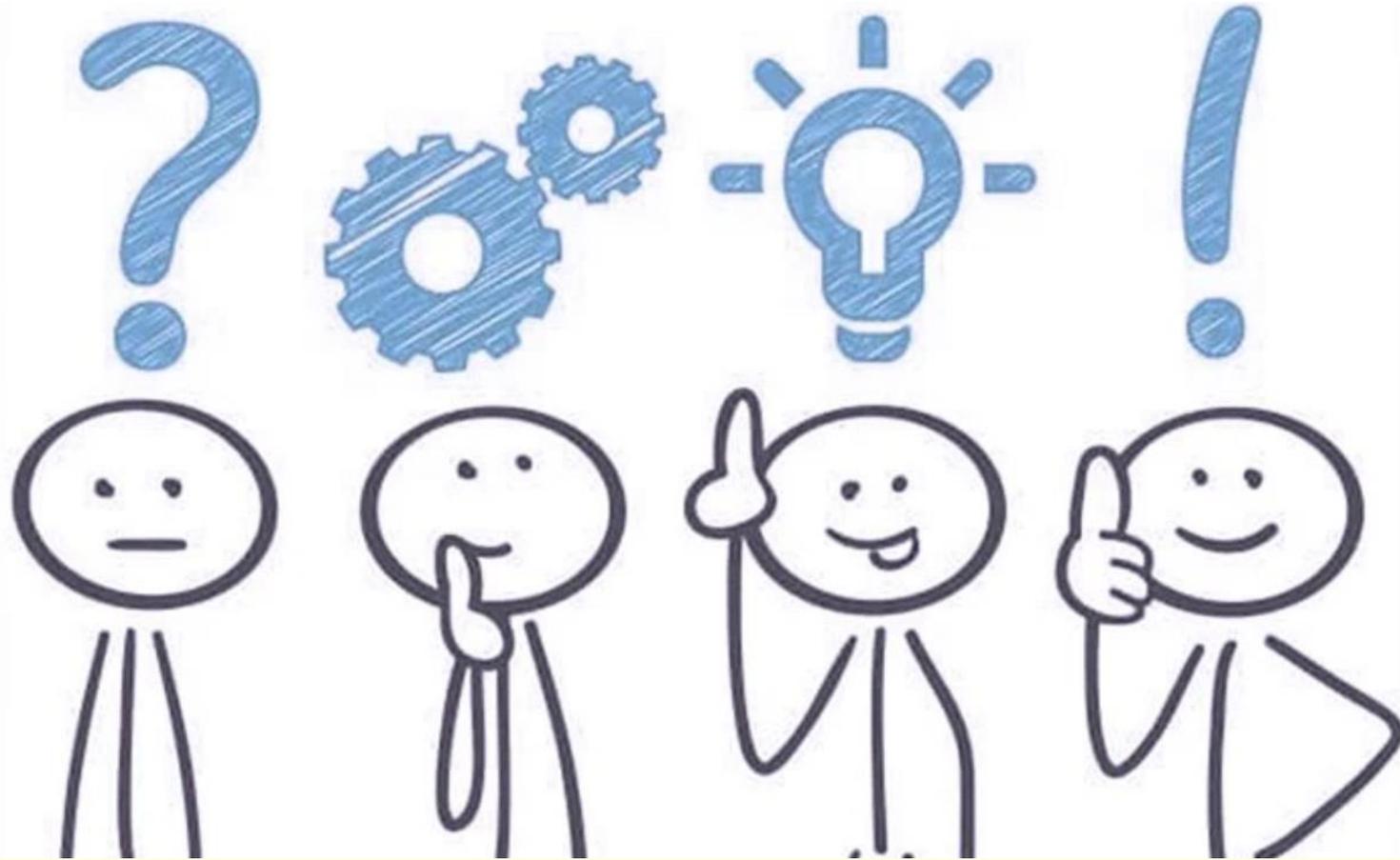


What You Have Learned

- ▶ Accessing the Scheduling Overview screen
 - Search Filters, Sorting, and Status colors
 - Opening and viewing the Schedule Detail
- ▶ How to create new schedules
 - Permanent Template
 - New Events
- ▶ Editing individual schedules
- ▶ Using Mass Edit for quick editing of a group of schedules



Questions...



How to Stay Connected

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