Mobile Caregiver+ Provider Portal Report Utilization Guide

Date: September 30, 2024 Version: 1.0



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1. Reporting

The Mobile Caregiver+ Solution offers the functionality needed to support Electronic Visit Verification (EVV) requirements. This technology enables Netsmart clients to verify Provider visits for personal or home-based services. The data collected during personal and home health services enables care Providers to record details of field visits using a mobile phone or special-purpose device.

This guide outlines the process for Providers to generate, export and save historical EVV data stored in the Mobile Caregiver+ Solution for use at a future time.

1.1. Generating a Report

To generate one of the offered reports:

- 1. From the Main Menu, click **Reports**.
- 2. Click on the name of the report you want to generate.

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	Dashboard	Reports				
Ē	Schedule	Report Name	Report Description			2
Ŧ	Visits	Missed Visit Report	Missed Visit Report	t		
:=	Work List	Recipients List	List of Recipients			
•	Claim Review	Recipients With Address Changes	List of Recipients Wi	vith Address Changes	s	
Ē	Prior Authorizations	Time Log	Payroll Worked Hour	ırs Data		
~	Reports	Visit	Standard Visit Detail	il Report		
	Users	Visit Completed Not Pre-scheduled	Visit Completed but	t Not Pre-scheduled b	before	
80	Recipients	Visit Detail	This report includes	s the four observation	n questions	
Ê	Provider	Visit Report	Visits by Recipient, U	User, Status or Date I	Range (ad-hoc)	
*	Training	Visit Service Reconciliation	Lists completed visit	it services by the trar	nsmission status fo	r payers where Netsmart is NOT
\$	Settings			Items per pag	ige <u>20 </u> ▼ 1	-9 of 9 < < > >
€	Logout					
	Version: 24.20	Privacy Policy	Copyright © 2021 Netsmart Technologies, Inc. All r	rights reserved.		Terms of Use

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	Dashboard	Filter Panel														
Ē	Schedule	Receiving Marcha			port v Zoom in Q z Preview Report – Current Day's EVV Activity											
Ŧ	Visits	Start Date 2024-09-01		UAT Netsmart DEMO Time Log: September 1, 2024 - September 27, 2024												
:=	Work List	End Date			Caregiver	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Billi
0	Claim Review	2024-09-27 Recipient	30		Katle Kelley		Bob Slob	FLT1	09/24/2024 10:05:00 AM	09/24/2024 10:10: 00 AM	0.08	09/24/2024 10:03: 48 AM	09/24/2024 10:04: 08 AM	0.01	09/24/2024 10:03:48 AM	09/2
	Prior Authorizations	Available: 9 Selected:	3		Kate Kelley		Bob Slob	FLT1	09/25/2024 10:25:00 AM	09/15/2024 10:30: 00 AM	0.08	09/25/2024 10:25: 15 AM	09/25/2024 10:27: 14 AM	0.03	09/25/2024 10:25:15 AM	09/2
~	Reports	Simba Thepit	~	Gr	EMPLOYEE		TEST RECIPIENT	ANIV	PM	00 PM	1.00	10 PM	56 PM	0.06	PM	-
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8	Recipients	Bob Smith TEST RECIPIENT	-													- 1
Ê	Provider	Aaron Dennis Bob Slob		₹												•
+	Training	Abel Linc	ert						Page I of							
\$	Settings	Caregiver Available: 5 Selected:	5													
€	Logout	Search list	Q													
		Daniela Gomez VIRGINAONE ENROYEE Adhey Wagner Kalie Kolley Haria BOIKO														
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Note: The solution will generate the selected report based on the current days EVV activity.

- 3. Use the filter panel, located on the left side of the report, to customize the report.
 - Depending on the report, different filters will display. In the Time Log Report above, filters include: Start and End Date, Recipient, and Caregiver.
 - Filters like Recipient and Caregiver have tabs labeled **All**, **None**, and **Invert** to further customize the report.

Reports > Time Log

✓ Preview Mode												
Start Date												
2024-09-01	30											
End Date												
2024-09-27	30											
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Available: 9	Selected: 0											
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🗸 All 🗙 No	ne 🔀 Invert											

- Click **All** at the bottom of the list to add all data elements that appear on the Available tab.
- Click **None** to clear all selections.
- Click on individual elements on the Available tab to select and unselect elements that will be included in the report. The total number of selections will be displayed on the Selected tab.
- Click **Invert** to "flip-flop" between selected and unselected items.

- 4. Scroll down and click the blue **Apply** command to generate the report.
- 5. Use the buttons listed below to view the contents of the report.
 - Zoom options appear at the top of the page.
 - Paging options appear at the bottom of the page. You may need to scroll down to see them.
 - You can also *export the report*.

Button	Description
Zoom in 🗨	Zoom in to enlarge report.
Zoom out Q	Zoom out to reduce size of report.
Page 2 of 36	See the number of the page displayed as well as the total number of pages in the report.
1<	Return to the first page of the report.
<	Move back one page.
>	Move forward one page.
>1	Move to last page of the report.

1.2. Exporting a Report

To generate and export one of the standardized reports:

1. From the Main Menu click **Reports**.

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	Dashboard	Reports	
Ē	Schedule	Report Name	Report Description
Ŧ	Visits	Missed Visit Report	Missed Visit Report
:=	Work List	Recipients List	List of Recipients
•	Claim Review	Recipients With Address Changes	List of Recipients With Address Changes
ē	Prior Authorizations	Time Log	Payroll Worked Hours Data
~	Reports	Visit	Standard Visit Detail Report
	Users	Visit Completed Not Pre-scheduled	Visit Completed but Not Pre-scheduled before
Bo	Recipients	Visit Detail	This report includes the four observation questions
Ê	Provider	Visit Report	Visits by Recipient, User, Status or Date Range (ad-hoc)
*	Training	Visit Service Reconciliation	Lists completed visit services by the transmission status for payers where Netsmart is NOT
\$	Settings		Items per page 20 ▼ 1-9 of 9 < < > >
€	Logout		
	Version: 24.20	Privacy Policy	Copyright © 2021 Netsmart Technologies, Inc. All rights reserved. Terms of Use

- 2. Click on the name of the report you want to generate and export to save.
- 3. Use the filters to select the data you want included in your report, and then click **Apply**.

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Ŧ	Visits	Start Date								UAT Netsn Time	nart DEMO Log			
		2024-09-01							Time Log:	September 1, 2	2024 - Septembe	er 27, 2024		
:=	Work List	End Date	Caregiver	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Billi
0	Claim Review	2024-09-27	Katie Kelley		Bob Slob	FLT1	09/24/2024 10:05:00 AM	09/24/2024 10:10: 00 AM	0.08	09/24/2024 10:03: 48 AM	09/24/2024 10:04: 08 AM	0.01	09/24/2024 10:03:48 AM	09/2
		Available: 9 Selected: 3	Katie Kelley		Bob Slob	FLT1	09/25/2024 10:25:00 AM	09/25/2024 10:30: 00 AM	0.08	09/25/2024 10:25: 15 AM	09/25/2024 10:27: 14.6M	0.03	09/25/2024 10:25:15 AM	09/2
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88	Recipients	Bob Smith												
Ê	Provider	Aaron Dennis Bob Slob	¢			-								•
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¢	Settings	Caregiver Available: 5 Selected: 5												
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- 4. For data extract, we recommend extracting no more than 1 year of data at a time for efficiency.
 - i. Based on business requirements and best practice, set date filters to monthly or quarterly data and export in smaller segments.
- 5. Click the **Export** drop-down arrow and select the format for your report.

Reports > Time Log											
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Preview Mode Start Date 2024-09-01	PDF		nart DEMO e Log 2024 - Septembe	er 27, 2024							
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Available: 9 Selected:	0		Bob Slob	FLT1	09/25/2024 10:25:00 AM	09/25/2024 10:30: 00 AM	0.08	09/25/2024 10:25: 15 AM	09/25/2024 10:27: 14 AM	0.03	
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6. Click on the download indicator to open the report.

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Reports > Time Log									
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nd Date	Caregiver	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Vie End
cipient	Daniela Gomez		Bob Smith	AETN	09/11/2024 2:45:00 PM	09/11/2024 2:50: 00 PM	0.08	09/11/2024 2:42: 05 PM	09/11/2024 2 07 PM
Available: 9 Selected: 3	Katie Kelley		Bob Slob	FLT1	09/24/2024 10:05:00 AM	09/24/2024 10:10: 00 AM	0.08	09/24/2024 10:03: 48 AM	09/24/2024 1 08 AM
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7. Open the downloaded report and save the report to the used device.

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Caregiver 2	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Billable Service End	Billable Service Duration	Billable-Actual Service Duration
Daniela Gomez		Bob Smith	AETN	09/11/2024 2:45:00 PM	09/11/2024 2:50:00 PM	0.08	09/11/2024 2:42:05 PM	09/11/2024 2:42:07 PM	0.00	09/11/2024 2:42:05 PM	09/11/2024 2:42:07 PM	0.00	0.00
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Katle Kelley		Bob Slob	FLT1	09/25/2024 10:25:00 AM	09/25/2024 10:30:00 AM	0.08	09/25/2024 10:25:15 AM	09/25/2024 10:27:14 AM	0.03	09/25/2024 10:25:15 AM	09/25/2024 10:27:14 AM	0.03	0.00
Maria BOJKO	Tellus124	Abel Linc	FLT1	09/25/2024 4:00:00 PM	09/25/2024 4:15:00 PM	0.25	09/25/2024 4:00:00 PM	09/25/2024 4:15:00 PM	0.25	09/25/2024 4:00:00 PM	09/25/2024 4:15:00 PM	0.25	0.00
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