Managing Employee Activity Scheduling and Calendars

Overview

The calendar is a central part of NDoc that allows users to view and schedule patient visits, time off, meetings and other tasks that are part of a regular workday schedule. Some activities available in Patient Activity, Contact Activity, and Volunteer Activity are able to be scheduled/charted within the scheduling/calendar screens as well. For additional guidance on how to navigate within the calendars, please refer to the internal help text via the help text using the **?** icon within the calendar screens.

Employee Activity/Calendar Settings

To manage the scheduling process and provide calendar access to users, agencies need to review two important settings pages. Each plays a separate role in the process. The settings pages and the content of each are as follows:

Calendar Settings Pages

These pages include three components and only relate to the views and permissions to view calendars.

Add/Change:

Provides controls related to employee details exposed within scheduling/calendars. Agencies can determine what details if address, primary phone, or cell/work phone information is displayed.

Permissions:

Allows agencies to select specific user types and choose the user types that the selected user type can view (i.e., RN can view fellow RN, LPN, Aides, etc.). To select more than one user type within the list, use the CTRL key and select as many user types as are applicable. The other option is to impose a Permissions Override which if set to YES enables all user types to view all user calendars. If no, then each individual user type's permissions will need to be set.

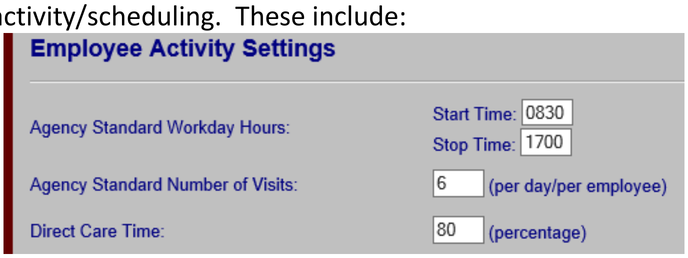
Print Permissions:

Allows agencies to Print the Table or Export the content to CSV.

Employee Activity Settings Page

This settings page includes three components and controls the specific details of scheduling, the timing of visits, and fields visible in the course of scheduling. The specifics are as follows:

Add/Change: This screen provides agencies a variety of specific controls for managing employee activity/scheduling. These include:



Agency Standards are set here for:

- Workday Hours
- Standard Number of Visits
- Direct Care Time

Note: These are set as default values for the entire agency. User Type and Employee Table settings take precedence.

Download 60 days of scheduled visits to client devices when using **Receive Patient** option.

Download 5 days of scheduled activities to client devices when using **Receive Calendar** option.

Download 10 days of **past** scheduled activities to client devices when using **Sync**, **Receive Patient** and **Receive Calendar** options.

Synchronization Settings:

- Download "X" number of days of scheduled visits to client devices when using Receive Patient option. *(minimum 5 days and maximum of 60 days allowed). Note: 3 days of past scheduled uncharted visit are set up in the Receive Patient option.*
- Download "X" number of days of scheduled activities to client devices when using Receive Calendar option. *(minimum 3 days and maximum of 60 days allowed and default 21 days if not defined.*
- Download "X" number of days of past scheduled visits to client devices when using Sync, Receive Patient, and Receive Calendar option. *(minimum 3 days and maximum of 10 days allowed)* ***NOTE:*** *Although the screen text does not reflect this setting also applies to Agency, Time Off, and Employee Other events.*

Conflict Checking?: (•) Yes ( ) No

Visit Verification - Standard Narrative Summary: Visit verification only. See signed visit note in patient's chart.

Visit Verification - Default Travel Type: Visit Travel Expenses

- **Conflict Checking** – applies to checking done within scheduling.
- **Visit Verification Settings** – These settings apply to default values being applied to visits set up through Visit Verification as described in the FASTForm.

The settings page also provides options for controlling authorizations when scheduling and the display of insurance information in the scheduling screens. The details related to these settings are described in detail under the *Managing Authorization* section within the *Authorization Warnings/Prevention Messaging (Insurance and Discipline Frequency)* category under *ADMINISTRATION>System> Settings>Employee Activity*.

Patient Summary > Visits

Display number of Unscheduled Skilled Nursing Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Physical Therapy Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Speech Therapy Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Occupational Therapy Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Respiratory Therapy Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Medical Social Services Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Nutrition Frequency Visits?: (•) Yes ( ) No

Display number of Unscheduled Aides Frequency Visits?: (•) Yes ( ) No

These settings control whether or not an agency wants to see the number of unscheduled frequency visits displayed with Frequency/Duration section as displayed under the Visits tab within the Patient Summary screens.

Permissions:

Allows agencies to select a user type and then specify which employee/patient calendar events can be added/edited for other designated user type(s) (i.e., RN can add/edit events for fellow RN, LPN, Aides, etc., but not for PT users). These events include:

- Employee Events: Agency, Time Off, and Other
- Patient Events: Scheduled Visits and Charted Visits

To select more than one user type within the list, use the CTRL key and select as many user types as are applicable. The other option is to impose a Permissions Override which if set to YES enables all user types to add/edit all employee/patient events on the calendars for all users. If no, then each individual user type's permissions will need to be set. Finally, a special setting is in place to allow users to add/edit appointments on the Patient Calendars.

Print Permissions:

Allows agencies to Print the Table or Export the content to CSV.

Employee Activity/Calendar Related Tables

Several tables provide content and options for the Employee Activity/Scheduling/Calendar functionality. The tables are all located under Administration>System>Tables and include the following:

Agency Reason

These entries appear when scheduling an Agency activity on the Employee Calendar.

Patient Characteristics

These entries are used to match the patient to the appropriate Clinician. These are characteristics of the patient, such as *smokes, has cats, etc.,* aid in choosing the clinician that does not have allergies to animals or smoking etc. when in the process of scheduling the visit. Employee Table>Demographics is where you would enter this information for the Employee/Clinician. Patient Characteristics can be charted within the Demographic screens within the charting screens. If agencies do not plan to use the Patient Characteristics to match up patient and clinician, then the entries can be inactivated.

Skills

These entries are used in matching the clinician with the skills that the patient requires when scheduling. Employee Table >Demographics is where these details are linked to the clinical. The skills could be any competences that the clinician must have before providing this type of care, such as: Wound vac, PICC dressing changes, Jackson Pratt drains etc.

Time off Reason

These entries appear when scheduling time off in the Employee Calendar.

Visit Reason

When scheduling visits in Employee Activity or Patient Calendar, this table supplies the reason for the visit. This table includes options to tie into the Service Provided Reason by Discipline. This will also link the Service Provided Reason to enable visit verification. Enter a visit standard time entry, which populates the calendar and holds a time for the visit. The actual time entered in visit charting will overwrite this time.

Visit Delete Reason

These entries appear when deleting a scheduled visit in the Employee/Patient Calendar.

Zone

This table populates entries within the Employee Table under Demographics that can be assigned to the clinician. These identified zones are then available when choosing a clinician when scheduling the visit. If the Agency uses Zones or areas where certain staff is “districted,” then those can be set up in this table. These entries assist in matching the clinician working in the zone where the patient is located.