



Missouri Ankota Manual

Users Guide
2019

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Ankota

Ankota™ enables the next generation of home care, understanding the rapid growth of the elderly population and the shifts to managed care and population health. The highly customizable software offers full home care agency and Electronic Visit Verification (EVV) management including telephony, GPS, fixed number generator fobs, biometric authentication and verification schema. It manages people, payers and programs via configurable business rule sets and supports optimized delivery of care in homes, readmission reduction, individualized plans of care and cost controls. Sophisticated scheduling algorithms support managing non-skilled and professional workers in post-acute markets that include AAA's, Medicaid, DME, therapy staffing, infusion and phlebotomy. Foresight Care™, an innovative remote patient monitoring service and patient engagement platform, helps avoid hospital readmissions at the lowest possible cost. Visit Ankota at <http://www.ankota.com/>.

Getting Starting with Ankota

Your Ankota system is a versatile and customizable management tool that offers a variety of ways to help optimize your business and to save you time. This manual will teach you the essentials of the Ankota system from onboarding, daily usage, and advanced features. We will cover general concepts, step-by-step procedures, and Best Practices in detail.

Preparing for the Onboarding Process

To get you onboarded with the system, we will start with a kick-off meeting with the Ankota team prior to your “go-live” launch.

During this initial meeting, we will ask you a number of questions to learn how we can best customize your Ankota system environment.

The information we will need from you to begin the process is as follows:

- Full names of office staff who will use the system (or the first few who will work on the project team).
- List of the Missouri programs your agency participates in (e.g., CDS, In-Home Services, HCY).
- Do you have any other referral sources such as private pay or VA?
- Your NPI and taxonomy codes.

You will also be asked to gather your client and caregiver demographical data, enter it into an Excel spreadsheet, and present it to Ankota so that we can upload the data into your system. (More details about this are explained in the next chapter).

Based on this discussion, the Ankota team will then configure your environment to best suit your organization’s needs.

Uploading Clients and Caregivers

As mentioned above, while your system is being configured by Ankota, your team will need to gather implementation data about your clients and caregivers into an Excel spreadsheet so that we can upload the data into your system. To make this process easier for you, Ankota will provide you with templates.

The following is the information you'll need to present in the Excel spreadsheet:

Client Information

Please provide:

- Program (e.g., CDS or In-Home)
- DCN (Medicaid ID)
- First Name
- Last Name
- Address (broken into street address, apartment, city, state and zip),
- Phone Number
- Diagnosis Code

Some of our customers also prefer to upload the following additional information:

- Date of Birth
- EIN
- SUTA

Caregiver / Attendant Information

Please provide:

- First and Last Name
- Address
- Phone Number
- As part of the upload, each Caregiver will be assigned a numeric ID and a PIN number for clocking into the EVV (Electronic Visit Verification) system. Here are some other considerations:
 - Most of our customers have Ankota assign 3 digit IDs to their caregivers (e.g., starting from 100 and going to 221)
 - For the PIN number, the most popular methods are to either use their birth month and date (like 1102 for November 2nd) or the last four digits of their social security number.
- Another consideration is whether your organization wants to associate any skills or certifications with your caregivers. This will be discussed in your implementation meeting.

A couple additional notes:

- Only active clients and caregivers are generally updated. If you want to upload historical clients or caregivers please ask us (there might be an additional charge for this service).
- Authorizations, Care Plans, and Schedules may also be loaded if you are able to produce an excel file with the information. If not, your team will need to load those into the system manually.

Understanding Roles

Roles are used to define security and access rights in Ankota. This includes determining the following for each "Role":

- The system areas (Main Menu items) that the user can see and access.
- The tabs within certain screens that the user can see.
- The functions the user can execute.

The Roles are setup by Ankota and are presented to customers as "Templates." While Templates and Roles define security, there are additional areas and ways in Ankota where security access can be even further defined.

For example:

- An Admin or Scheduler Role in Ankota can see all patients.
- A Worker can be configured in three ways:
 - The user can only see their own visits (this is typical for caregivers) and they have no access to any Patient functions;
 - The user can see their own visits AND can see the EHR of Patients assigned to him or her (common for case managers, nurses and therapists);
 - The user can see all patients (this is common in small agencies).

Therefore, to set up a new user (e.g., an Office user) requires a combination of assigning a Role and then the related Template to that user.

The hierarchy of templates is as follows:

- **Organization** – Organizations have templates associated with them and for their Roles. For example: an “Admin” Role set at the Organization level could include three templates: HR, Billing, and Super Admin.
- **Modules** – Modules are the items included on the Main Menu that appears on the left side of the screen. Note that the Main Menu listings can be individual items such as the "Patients Screen" or they can be a grouping of items such as within the "Billing Function."
- **Pages** – Modules include one or more Pages. Modules can be customized within Templates, and Templates can be customized by user. Thus, different users can log in to the same Role and see different data sets. For example, there may be six or seven Pages within the Billing Module and some of the templates may include a Page for managing “Accumulated minutes and adjustments” whereas a different Template may omit those Pages.
- **Template Tabs** – Template Tabs control the settings on a Page. This could include for example, which fields, columns and function buttons to show or hide.

The Ankota Support group can change many screens to make fields visible or invisible, so if you have specific preferences or needs, please let us know.

Setting User Security

Ankota comes with a set of pre-configured security roles that determine what users can see and do based on their Role and the Templates assigned to each user.

HOWEVER, since every agency operates differently, it is critical that we work with your agency individually to ensure that Roles and Templates are set up per your agency’s preferences.

We have identified that the "best practice" for setup of Roles and Templates is to first define the "Super Admin" role, and then discuss with the customer the other roles, since they will all be subsets of the Super Admin role. For example:

- Set up the “Super Admin” Role to have access to all Ankota features and screens.
- For the “HR” role, we copy the “Super Admin” role, and then remove the unwanted Modules and Templates (e.g., take out the Billing Module, then go to the Reports Module Pages and remove the billing related reports).

- We set up the “Billing” Role the same way and so on, each time copying the “Super Admin” Role, then working from there to subtract the desired areas, screens, functions and fields.

Using the System for the First Time

Logging In

URL	<Ankota.net>	
User Name	<your preference>	(some agencies use emails while other use first initial + last name)
Password	<your password>	(we set a default password and make users change it the first time)
Organization:	<your organization code>	



The image shows the Ankota Customer Login interface. At the top, the Ankota logo is displayed with the tagline "Next Generation Home Care Management". Below the logo, there is a large magnifying glass graphic over a group of stylized human figures. To the right of the graphic, the title "CUSTOMER LOGIN" is centered. Below the title, there are three input fields labeled "USER NAME", "PASSWORD", and "ORGANIZATION". The "ORGANIZATION" field contains the text "CS". Below the input fields, there is a link "FORGOT YOUR PASSWORD?" and a checkbox labeled "KEEP ME LOGGED IN". At the bottom right, there is a "Login" button with a right-pointing arrow. At the very bottom, a release date and time are shown: "Release 4/6/2017 6:54:32 AM | US Patent Pending ©Ankota LLC. All rights reserved."

ANKOTA
Next Generation Home Care Management

CUSTOMER LOGIN

USER NAME

PASSWORD

ORGANIZATION

[FORGOT YOUR PASSWORD?](#)

☐ KEEP ME LOGGED IN

Login ➔

Release 4/6/2017 6:54:32 AM | US Patent Pending ©Ankota LLC. All rights reserved.

Profile

Change Password

After you log in for the first time you will be prompted to change your password.

1. Enter your old password.
2. Set and confirm new password.
3. Save Password.

After setting your password you can also set a security question with an answer. Complete the fields and click Save.

Change Password

Old Password:

New Password:

Confirm Password:

Validate

Save Password

Security Question

Security Question:

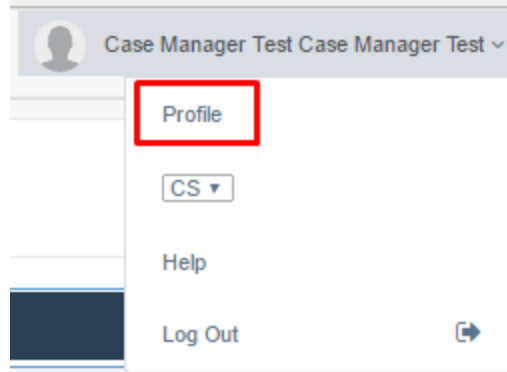
Answer:

Save

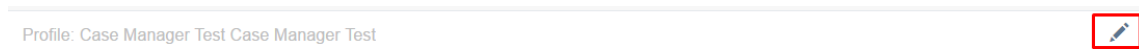
Setting Your Availability

An important step in the scheduling process is for Caregivers (field workers, caregivers, etc.) to enter in their time availability into the system. In the Caregivers environment, availability is set via the “Profile” section, accessed by accessing the cluster located at the top right of your screen.

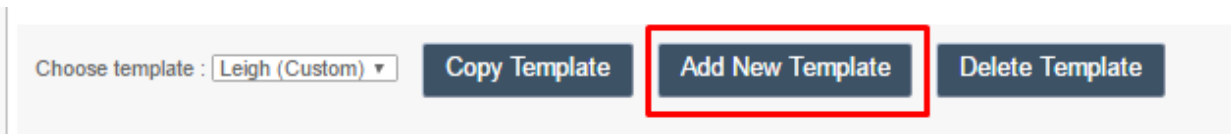
NOTE: This is the same menu where you can change your password and security question.



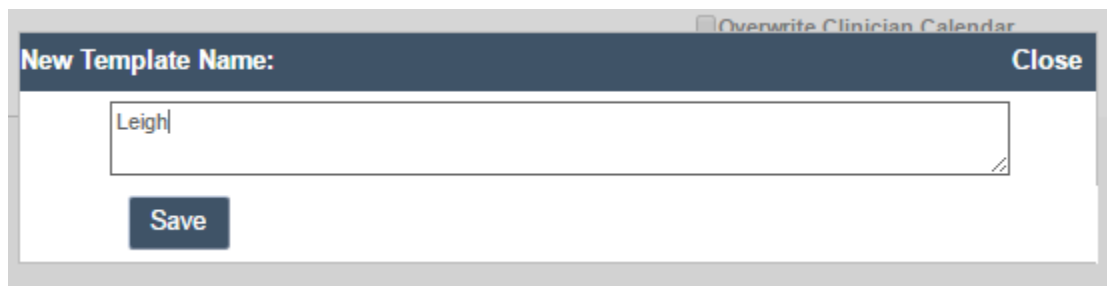
1. At the top of the profile screen you will find an “Edit” icon.



2. Click the Edit icon.
3. Select “Add New Template” to add a new availability template.



- a. Give the new template a name.

A screenshot of a 'New Template Name' dialog box. The dialog has a dark blue header with the text 'New Template Name:' and a 'Close' button. Below the header is a text input field containing the text 'Leigh'. At the bottom of the dialog is a 'Save' button. In the top right corner of the dialog, there is a checkbox labeled 'Overwrite Clinician Calendar'.

- b. Save the template.
- c. A blank Availability template will appear.
- d. Next, add your available days one at a time by clicking on the check box next to the day and pressing “+Add time”.

Enter the default times during which at least one Clinician will be available for assignment. Check

<input type="checkbox"/> Days		Work Times	Worker Address	Modified By/Date
<input checked="" type="checkbox"/> Monday	+ Add Time			
<input type="checkbox"/> Tuesday				
<input type="checkbox"/> Wednesday				
<input type="checkbox"/> Thursday				

e. Then, set your working hours for that day in a typical week.

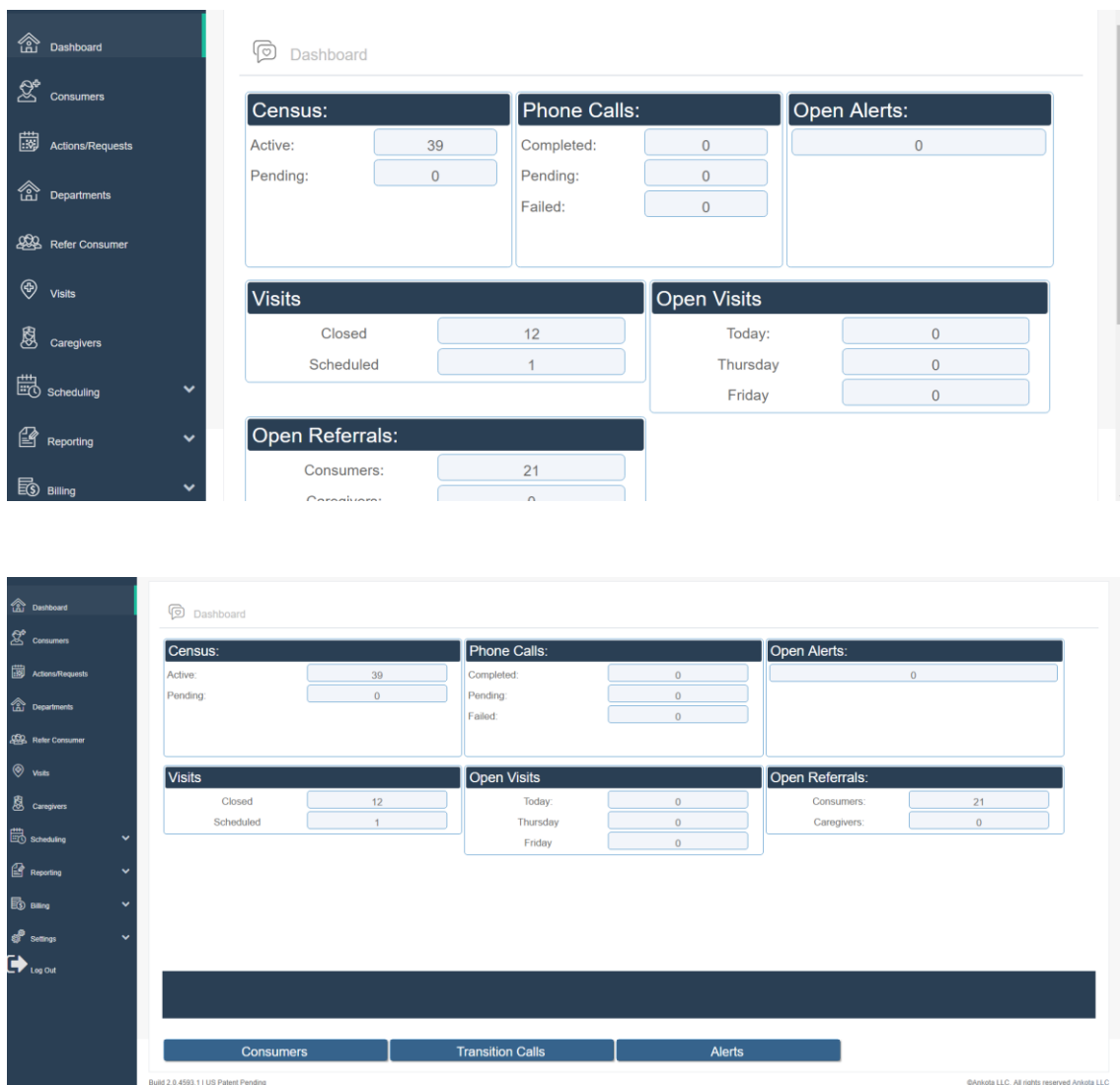
<input type="checkbox"/> Days		Work Times	Worker Address	Modified By/Date
<input checked="" type="checkbox"/> Monday	+ Add Time	1 <div>Working</div>	07:30 AM to 04:00 PM Visit Category: All	Address: Default SA 3/7/2017 Save
<input type="checkbox"/> Tuesday		<div>Working</div>		
<input type="checkbox"/> Wednesday		<div>Busy</div>		
<input type="checkbox"/> Thursday		<div>Unavailable</div>		
<input type="checkbox"/> Friday		<div>Unavailable (Full Day)</div>		
		<div>Stand-By</div>		
		<div>Available</div>		

NOTE: The default is “Working” and Ankota looks at “Working” time slots as available to be scheduled.

Dashboard

When you first log in to Ankota, you will be presented with the Dashboard. This screen gives you a quick-glance macro overview of your scheduling processes. It illustrates your current count for data such as Census, Open Visits, Closed Visits, and so on.

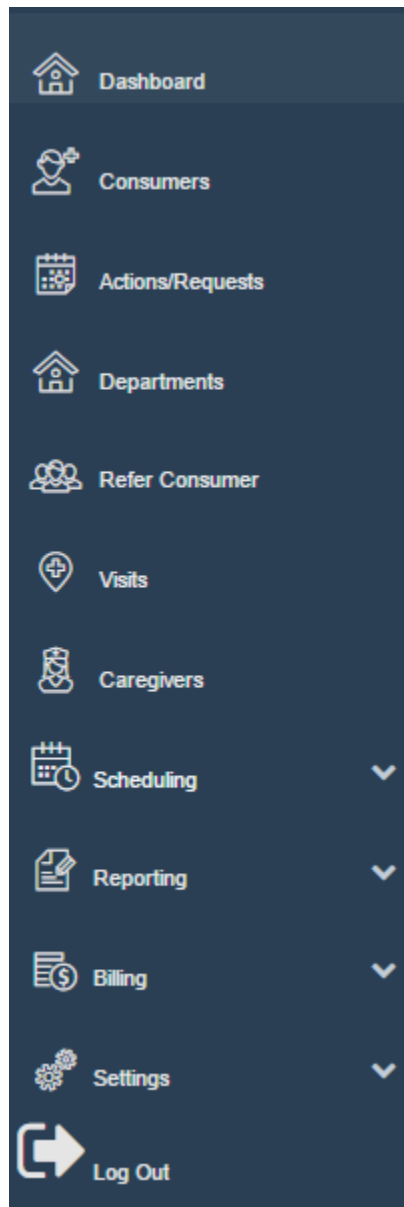
You will also notice the Main Menu of options, located within the blue bar to the left side of the screen. Please see the screen shot below, as well as the next chapter in this manual, for further information about the main menu.



Main Menu

The Main Menu is where you will access the tasks, reports, and settings in Ankota. The Main Menu is customizable based upon your organization's needs. If you have any questions regarding limiting or adding tabs or modules, please contact an Ankota representative.

Below is an example of how the Main Menu appears. This manual will discuss each menu item in future chapters.



Caregivers

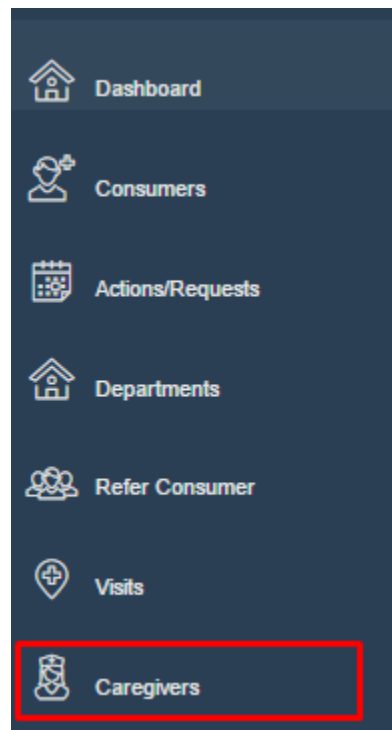
Add a New Caregiver

Caregivers can either be field workers or office workers, but a single employee cannot be both a field worker and an office worker. It's easy to onboard new caregivers, but there are a few things to remember:

- Caregivers will use IVR (clock in/clock out from a telephone or smartphone device) for EVV (Electronic Visit Verification), to clock-in and clock-out of client and consumer visits.
- Caregivers will use "Family Logins" for assigned consumers and clients to be able to view messages and documents. (Please refer to the section [Adding A Caregiver to the Family Mobile Application](#) under the Client Chapter for more information.)
- An alert can be set for each employee to note when their skills ("checks") are updated or soon to be expired. (This are reviewable in the [Actions/Request](#) tab)

Steps for Adding a Caregiver

1. Select **Caregivers** from the Main Menu.



- When the Caregivers screen appears, select **Add New**.

The screenshot shows the 'Caregivers' management interface. At the top, there are search and filter fields for 'Filter:', 'Caregiver ID', and 'Caregiver Status' (set to 'Active'). Below these is a 'Caregiver Type' dropdown menu. On the right side, there is a 'Search' button and a '+Add new' button, which is highlighted with a red rectangular box.

- A blank Caregiver screen will appear. Note the tabs along the top of the record...

The screenshot shows a blank record for a new caregiver. At the top, there are icons for a user and a document, and a 'Close' button. Below this is a row of tabs: 'Personal Information', 'HR', 'Skill', 'Availability', 'Roles', 'Employment', and 'Documents'. The 'Personal Information' tab is highlighted with a red rectangular box. The main form area contains various input fields for personal details, including 'User Role' (set to 'Caregiver'), 'Gender', 'First Name', 'Middle Name', 'Last Name', 'Title', 'Date of Birth', 'SSN', 'Caregiver ID', and 'Caregiver Code'. There are also checkboxes for 'Create Web User' and 'Create IVR/Mobile User', a 'Status' dropdown (set to 'Active'), and dropdowns for 'Pay Code' and 'Pay Code 24'. A 'Finance ID' field and an 'Is Vendor' checkbox are also present. On the right, there is a 'Show Image' checkbox, a placeholder image, and an 'Upload Image' button. Below the main form, there are sections for 'Addresses', 'Emails', and 'Phones', each with an 'Add' button. A 'Save Personal' button is located at the bottom left.

- Start by entering the **Personal Information** for the caregiver.

NOTE: The only required fields are:

- First Name
- Last Name
- Gender
- Caregiver ID

However, in order to make the caregiver “active for EVV” or “active as an office user” you must also register them.

Demographics

5. Enter the caregiver's **First Name**, **Last Name** and **Gender**.

NOTE: The User Role defaults to **Caregiver** as this is the most common User Role.

6. Select the checkbox for "**Create IVR/Mobile User**".
 - a. This will open the IVR/Mobile User setup fields for "**User Number**" and "**PIN**".
 - b. The system will give you a valid and available IVR/Mobile ID (**User Number**). It is HIGHLY RECOMMENDED that you use the system generated ID. However, you can verify the integrity of any **User Number** by selecting the Check button. If valid, a green check circle with Valid will appear under the **User Number**.

Create IVR/Mobile User ☒

User Number:

Pin:

Status:

Pay Code:

Pay Code 24:

Finance ID:

Is Vendor: ☐

IMPORTANT: If you wish to change the ID, you **MUST** press the **CHECK** button to make sure it is valid and not assigned to another caregiver. If you don't follow this instruction, there's a chance that two caregivers will have the same ID and be unable to clock-in

7. Create a PIN for the caregiver. This is generally the last 4 digits of the SSN or the month and date of birthdate (e.g., 0724 for July 24th). Enter it to the **Pin** field.
8. Enter the caregiver's date of birth and social security number in the indicated fields.
9. Enter the Caregiver ID.

IMPORTANT: SET THIS TO THE SAME NUMBER AS THE USER NUMBER AS SHOWN BELOW:

10. Enter the Pay Code. Select the Pay Code from the drop down box. If you need additional rates, email support@ankota.com and we will assist with entering them.

11. Now Save the record by selecting **Save Personal** in the lower left of the screen.

12. Now you can add the remaining caregiver information.
13. Enter the caregiver's address. Ankota supports multiple addresses for each caregiver, by type (e.g., home, contracted facility, etc.) You can set one address as "Primary." Press Add to add an address.
14. **Address 1** is the street address. Use **Address 2** for the apartment number if needed.
15. Enter the **City**. **State** defaults to Missouri. Also enter the **Postal code** (zip code).

Add new address Close

Facility/Company:

Address 1:

Address 2:

City:

State:

Postal code:

County:

Country:

Address type:

Status:

Start Date:

End Date:

☐ Latitude and Longitude manual override

Longitude: Localize Address

Latitude:

Save

Latitude and Longitude manual override

Longitude: Localize Address

Latitude:

16. Once the address is entered, select **Localize Address** to validate the address for GPS purposes and then select **Save**.
17. Enter the caregiver's phone numbers. Ankota supports multiple phone numbers for each caregiver, by type (e.g., cell, home, etc.), but most agencies

enter the caregiver's primary cell phone. Press **Add** to add a phone number.

Phones				
Phone	Extension	Type	Order	Note
Add				

18. Fill in the **Phone number** and **Phone Type**. You can also enter any additional notes related to this phone number. Then press **Save**.

Add new phone

Close

Phone number:

314-555-1212

Phone type:

Cell

Note:

Extension:

Time of day:

Order:

1

FamilyConnect:

☐

Visit Reminder:

☐

Save

19. In the same way you added the address and phone number, enter the caregiver's email address. Ankota supports multiple email addresses for each caregiver, by type (e.g., work, home, etc.) Press Add to add an email address.

Emails		
Email	Type	Message
Add		

Eligibility to Work

To manage worker eligibility, click on the **HR** Tab, then select the **Requirements** sub-tab:



Most agencies track:

- Family Care Safety Registry (FCSR)
- Office of Inspector General (OIG)
- Missouri Electronic Disqualification List (EDL)
- E-Verify dates.

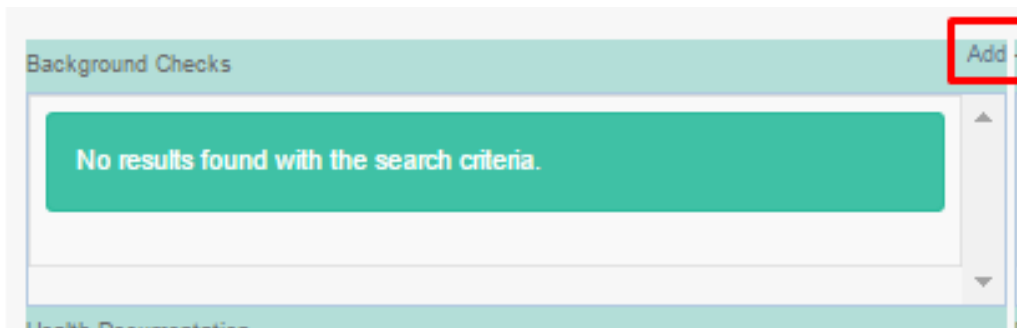
If you desire to track additional items, please contact support@ankota.com and tell us what else you would like to track.

The **Requirements** tab includes four areas:

- Background Checks
- Health Documentation
- Tax Forms
- Employment Authorization

Missouri agencies are typically focused only on **Background Checks**. Here you can add tracking for **FCSR**, **OIG**, **EDL**, and **E Verify**.

1. In **Background Checks** select **Add**.



2. Choose the background check item you would like to add and select it.
3. Enter the date that it was verified and the expiration date.

4. Press **Save**.

NOTE This section allows you to add the same check multiple times (so you can maintain a complete history of these checks).

Caregivers can either be field workers or office workers, but a single employee cannot be both a field worker and an office worker. It's easy to onboard new caregivers, but there are a few things to remember:

- Caregivers will use IVR (clock in/clock out from a telephone or smartphone device) for EVV (Electronic Visit Verification), to clock-in and clock-out of client and consumer visits.
- Caregivers will use "Family Logins" for assigned consumers and clients to be able to view messages and documents. (Please refer to the section [Adding A Caregiver to the Family Mobile Application](#) under the Client Chapter for more information.)
- An alert can be set for each employee to note when their skills ("checks") are updated or soon to be expired. (This are reviewable in the [Actions/Request](#) tab)

Steps for Adding a Caregiver

20.  Select **Caregivers** from the Main Menu.

21. When the Caregivers screen appears, select **Add New**.



22. A blank Caregiver screen will appear. Note the tabs along the top of the record...

Save Personal

23. Start by entering the **Personal Information** for the caregiver.

NOTE: The only required fields are:

- First Name
- Last Name
- Gender
- Caregiver ID

However, in order to make the caregiver “active for EVV” or “active as an office user” you must also register them.

Demographics

24. Enter the caregiver’s **First Name**, **Last Name** and **Gender**.

NOTE: The User Role defaults to **Caregiver** as this is the most common User Role.

25. Select the checkbox for "**Create IVR/Mobile User**".

- a. This will open the IVR/Mobile User setup fields for “**User Number**” and “**PIN**”.
- b. The system will give you a valid and available IVR/Mobile ID (**User Number**). It is HIGHLY RECOMMENDED that you use the system generated ID. However, you can verify the integrity of any **User Number** by selecting the Check button. If valid, a green check circle with Valid will appear under the **User Number**.


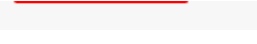
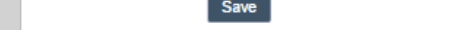



IMPORTANT: If you wish to change the ID, you MUST press the CHECK button to make sure it is valid and not assigned to another caregiver. If you don't follow this instruction, there's a chance that two caregivers will have the same ID and be unable to clock-in

26. Create a PIN for the caregiver. This is generally the last 4 digits of the SSN or the month and date of birthdate (e.g., 0724 for July 24th). Enter it to the **Pin** field.

27. Enter the caregiver’s date of birth and social security number in the indicated fields.

28. Enter the Caregiver ID.

IMPORTANT: SET THIS TO THE SAME NUMBER AS THE USER NUMBER AS SHOWN BELOW:

29.  Enter the Pay Code. Select the Pay Code from the drop down box. If you need additional rates, email support@ankota.com and we will assist with entering them.
30.  Now Save the record by selecting **Save Personal** in the lower left of the screen.
31. Now you can add the remaining caregiver information.
32. Enter the caregiver's address. Ankota supports multiple addresses for each caregiver, by type (e.g., home, contracted facility, etc.) You can set one address as "Primary." Press Add to add an address.
33. **Address 1** is the street address. Use **Address 2** for the apartment number if needed.
34.  Enter the **City**. **State** defaults to Missouri. Also enter the **Postal code** (zip code).
35. Once the address is entered, select **Localize Address** to validate the address for GPS purposes and then select **Save**.
36.  Enter the caregiver's phone numbers. Ankota supports multiple phone numbers for each caregiver, by type (e.g., cell, home, etc.), but most agencies enter the caregiver's primary cell phone. Press **Add** to add a phone number.
37. Fill in the **Phone number** and **Phone Type**. You can also enter any additional notes related to this phone number. Then press **Save**.

38. In the same way you added the address and phone number, enter the caregiver's email address. Ankota supports multiple email addresses for each caregiver, by type (e.g., work, home, etc.) Press Add to add an email address.


Eligibility to Work

To manage worker eligibility, click on the **HR** Tab, then select the **Requirements** sub-tab:



Most agencies track:

- Family Care Safety Registry (FCSR)
- Office of Inspector General (OIG)
- Missouri Electronic Disqualification List (EDL)
- E-Verify dates.

If you desire to track additional items, please contact support@ankota.com and tell us what else you would like to track.

The **Requirements** tab includes four areas:

- Background Checks
- Health Documentation
- Tax Forms
- Employment Authorization

Missouri agencies are typically focused only on **Background Checks**. Here you can add tracking for **FCSR**, **OIG**, **EDL**, and **E Verify**.

5. A screenshot of a web application showing a section titled 'Health Documentation' with a light blue header bar.

In **Background Checks** select **Add**.

6. Choose the background check item you would like to add and select it.
7. Enter the date that it was verified and the expiration date.



8. Press **Save**.

NOTE This section allows you to add the same check multiple times (so you can maintain a complete history of these checks).

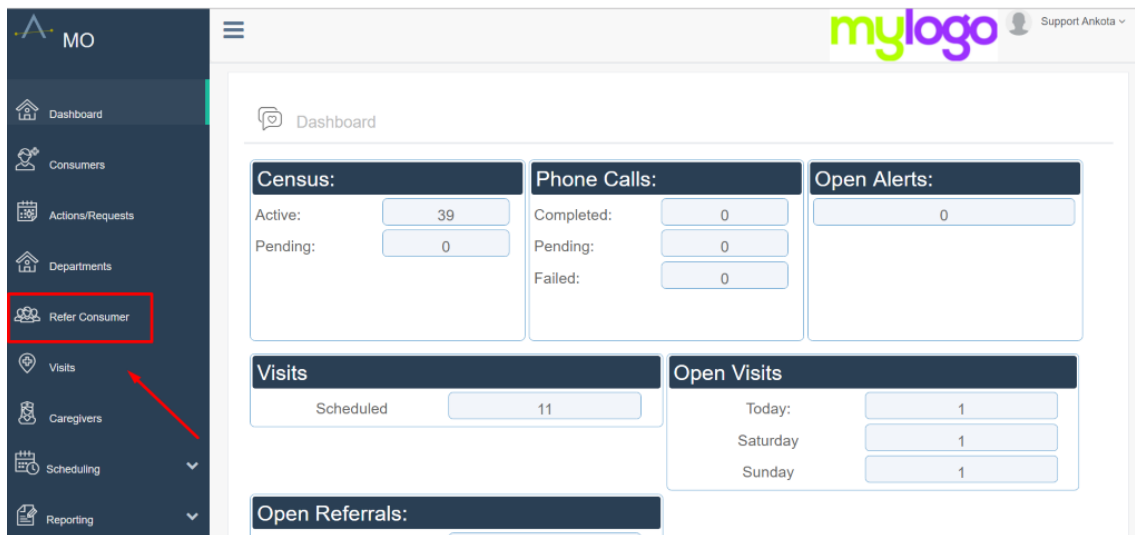
Background Checks						Add
Checks						
EDL	2/1/2017	4/30/2017	Not Open	Ankota, Support		
eVerify	1/30/2017	1/29/2018	Not	Ankota,		
Health Documentation						

Clients

Adding a Client (Refer Consumer)

To add a new Client into the system...

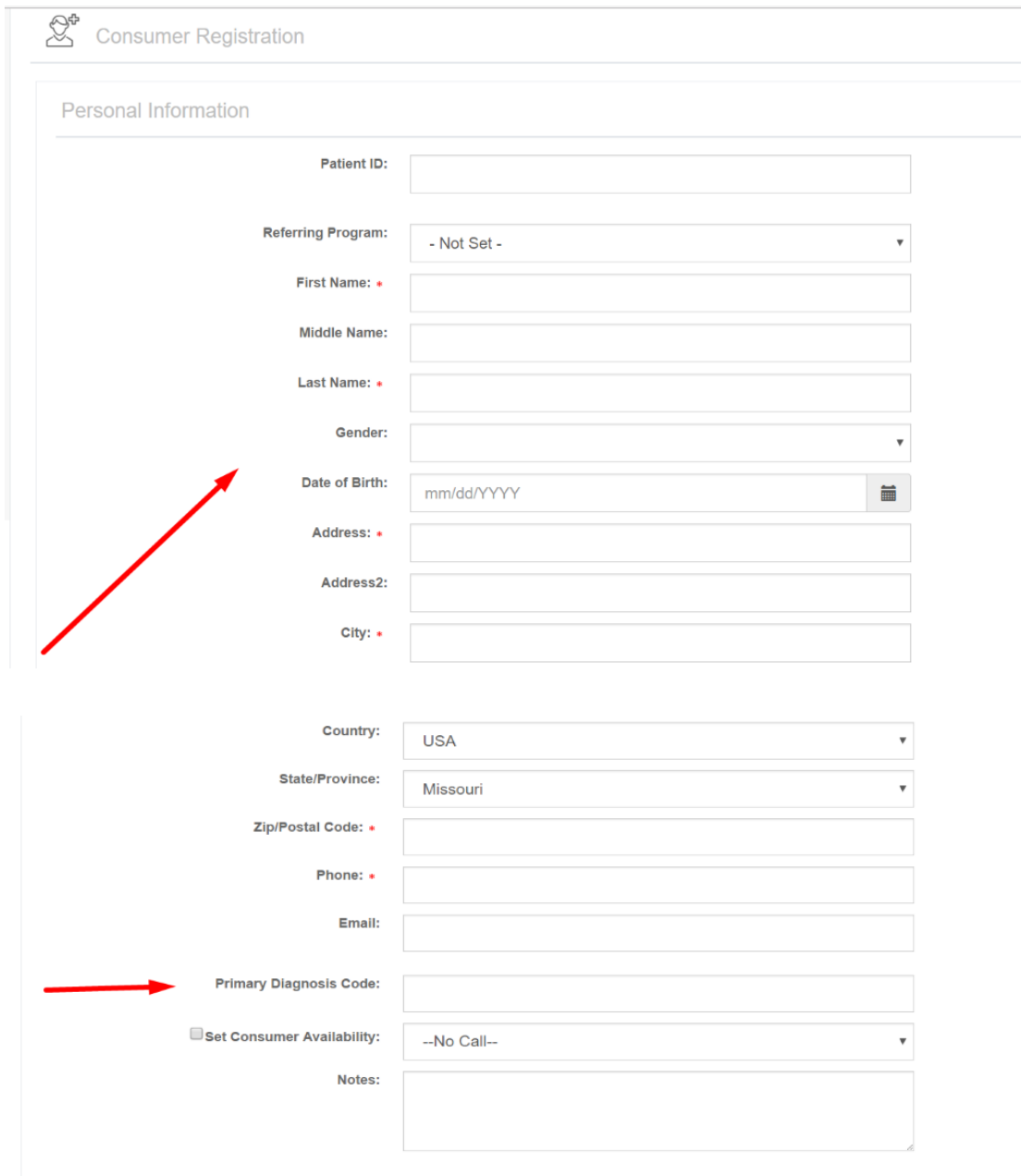
1. Click "Refer Consumer" in the menu bar. (It may be labeled: "Refer Client" in your environment).



2. Fill in the Patient ID (e.g., Medicaid ID) and select the "Referring Program (e.g. Consumer directed services CDS).

The screenshot shows the 'Personal Information' form. Two red arrows point to the 'Patient ID' text input field and the 'Referring Program' dropdown menu, which is currently set to '- Not Set -'. Below these fields are other form elements: First Name, Middle Name, Last Name, Gender, Date of Birth (with a calendar icon), Address, Address2, City, and Country.

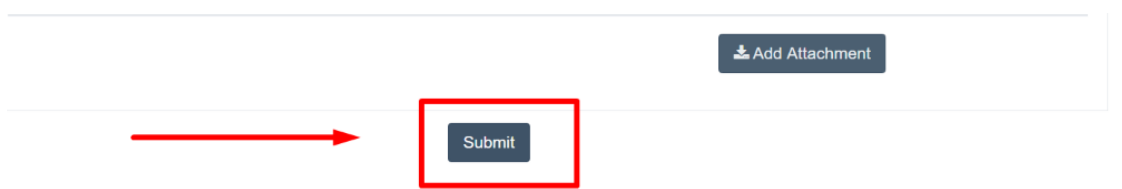
3. Fill in the "Starred" mandatory fields of Name, Address, and Primary Diagnosis.



The image shows a 'Consumer Registration' form. At the top, there is a header with a user icon and the text 'Consumer Registration'. Below this is a section titled 'Personal Information'. The form contains several input fields: 'Patient ID', 'Referring Program' (a dropdown menu showing '- Not Set -'), 'First Name', 'Middle Name', 'Last Name', 'Gender' (a dropdown menu), 'Date of Birth' (with a date picker icon and placeholder 'mm/dd/YYYY'), 'Address', 'Address2', 'City', 'Country' (dropdown showing 'USA'), 'State/Province' (dropdown showing 'Missouri'), 'Zip/Postal Code', 'Phone', 'Email', 'Primary Diagnosis Code', 'Set Consumer Availability' (checkbox and dropdown showing '--No Call--'), and 'Notes'. A red arrow points from the left towards the 'First Name' field. Another red arrow points from the left towards the 'Primary Diagnosis Code' field.

(There are other fields on this screen that you can enter in additional info or attach relevant documents to the profile, but future tutorials will go over these steps.)

4. Press "Submit".

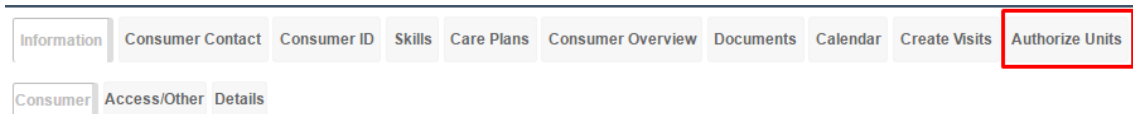


The image shows the bottom section of the form. It contains a button labeled 'Add Attachment' with a download icon. Below this is a large red arrow pointing towards a 'Submit' button, which is highlighted with a red rectangular box.

Setting Authorized Service for Clients

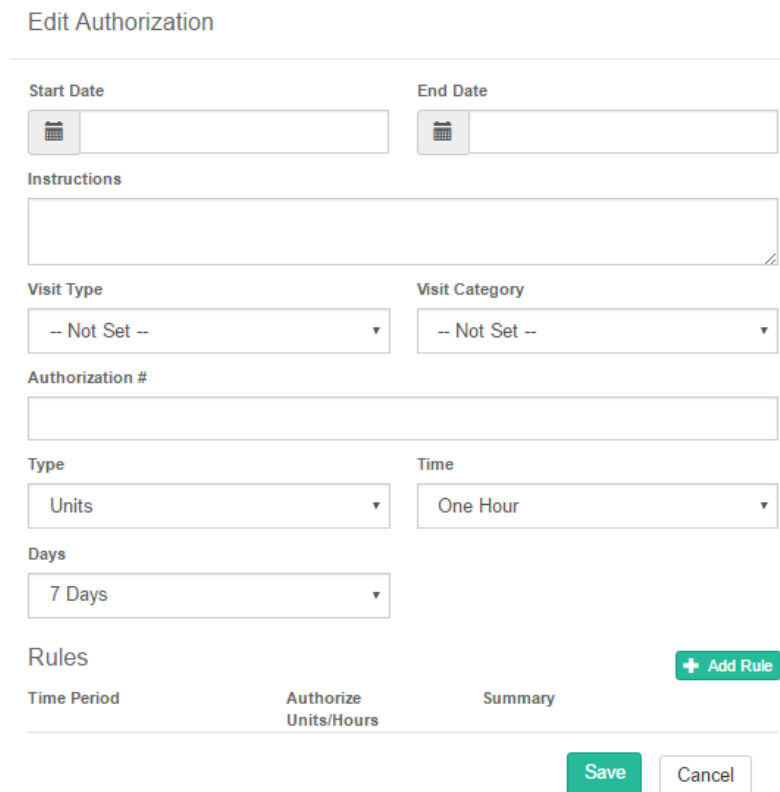
A client may be sent a plan of care with authorized units from Cyber Access or another agency or if private pay your organization will have contracted hours with the client. After you have entered a client's personal information, you will enter the authorized units.

1. In the Patient screen, select the **Authorized Units** tab.



The screenshot shows a horizontal row of tabs: Information, Consumer Contact, Consumer ID, Skills, Care Plans, Consumer Overview, Documents, Calendar, Create Visits, and Authorize Units. The 'Authorize Units' tab is highlighted with a red rectangular border. Below this row, there is another set of tabs: Consumer, Access/Other, and Details.

2. From the Cyber Access or other authorization source as your guide, enter the authorization information. A Patient may have one or several active authorizations.
 - a. Select "+ Add New".



The screenshot shows the 'Edit Authorization' form. It includes the following fields and controls:


- Start Date** and **End Date**: Each has a calendar icon and a text input field.
- Instructions**: A large text area for notes.
- Visit Type** and **Visit Category**: Both are dropdown menus currently set to "-- Not Set --".
- Authorization #**: A text input field.
- Type** and **Time**: Both are dropdown menus. 'Type' is set to 'Units' and 'Time' is set to 'One Hour'.
- Days**: A dropdown menu set to '7 Days'.
- Rules**: A section with a table header:

Time Period	Authorize Units/Hours	Summary
<div style="text-align: right;"> + Add Rule </div>		
- Save** and **Cancel**: Two buttons at the bottom right.

- b. Enter start Date and End Date.

NOTE: For a historical record, when a patient receives a new authorization, enter an end date in the previous authorization and begin a new authorization for the updated contract.

- c. You can add any necessary instructions in the Instructions dialog box.
 - d. Select Visit Type.
 - i. The Visit Category will populate from the Visit Type.
 - b. Enter the Type. Options include Units, Mileage, Hours.
 - c. Enter appropriate time units.
 - d. Assign number of days per week.
3. After you have entered the basic authorization information, you can add additional rules.
- a. Select “+ Add Rule”.
 - b. Enter the time period through the Drop down “Per Day Range”.
 - c. Enter the authorized units.
 - d. A summary of hours per day will be calculated based upon the data in the rules, the type and the time.

Rules			+ Add Rule
Time Period	Authorize Units/Hours	Summary	
Monthly ▼	434	3.50h /day	

4. **Save.**

Editing Units on Active Clients

To edit units on active clients:

1. Click "Clients," select the client, click "Authorize Units," then click "Edit."
2. Scroll to the bottom and edit the number of units, press "tab" to see units per visit, then click "Save."

Creating a Care Plan

After the authorized units have been established, you can define the Care Plan items that are associated with the authorization. Ankota uses the care plan to report task completion at the end of a caregiver's visit through multiple Electronic Visit Verification (EVV) options. [This manual will cover EVV in a later section.](#)

1. To set a Care Plan, select the **Care Plan** tab in the Patient's tab.

The screenshot shows a horizontal navigation bar with several tabs: Information, Consumer Contact, Consumer ID, Skills, Care Plans, Consumer Overview, Documents, Calendar, Create Visits, and Authorize Units. The 'Care Plans' tab is highlighted with a red rectangular box.

2. Select "New".

The screenshot shows the 'Add Plan' form. At the top, there are two buttons: 'Add Plan' and 'Cancel'. Below them, there is a 'Create Plan' label followed by a text input field, which is highlighted with a red rectangular box. Below this is a checked checkbox labeled 'No Expiration Dates'. Then, there is an 'Active From' label followed by a date input field showing '03/30/2017'. Below that are three dropdown menus: 'FC Frequency' set to 'Each visit', 'Type' (empty), and 'CSD Frequency' set to '--Select--'. At the bottom of the form, there is a 'Create' button, which is highlighted with a red rectangular box.

3. Name the care Plan under "Create Plan".
4. Select "Create".

NOTE: These are the only three steps needed to complete for a typical authorized care plan.

5. After the plan has been created, click the "Plan Name".

Plan Name	Type	Visit ID	Active From	Active Until	Modified Date	Is Current	CSD Frequency			Delete
Paul Cezanne		0	3/30/2017		3/30/2017	Yes			Copy	

6. From here you can enter the following Care Plan Categories:
 - a. Personal Care
 - b. Homemaker
 - c. Advanced Personal Care
 - d. Respite
 - e. Advanced Respite
 - f. CDS
 - g. Private Pay
7. To assign items to the categories, click “Update” next to the appropriate Care Plan Category.

Homemaker	Update
-----------	--------

8. Select the appropriate items with the check box to the right and “Assign Selected Item”.

Add New Item		Cancel
Skill		
Meals Dishes	<input checked="" type="checkbox"/>	
Clean Kitchen	<input type="checkbox"/>	
Clean Bath	<input checked="" type="checkbox"/>	
Clean Living Area	<input type="checkbox"/>	
Laundry home or offsite	<input checked="" type="checkbox"/>	
Iron Mend	<input type="checkbox"/>	
Wash Windows Blinds	<input checked="" type="checkbox"/>	
Trash	<input type="checkbox"/>	
Shopping or Errands	<input type="checkbox"/>	
Essential Correspondence	<input type="checkbox"/>	
Assign Selected Item		

9. Now that the tasks have been assign, you can:
 - a. Add specific notes
 - b. Add a Min and Max times per week
 - c. Select “All” or specify specific days of the week

- i. Uncheck "All" to define specific days of week.

Homemaker				Update	
Item	Choice	Note	Times/Week (Min - Max)	Days of Week	
Meals Dishes	Not Set ▾	<input type="text"/> - +	0 - 0	<input checked="" type="checkbox"/> All	
Clean Bath	Not Set ▾	<input type="text"/> - +	0 - 0	<input checked="" type="checkbox"/> All	
Laundry home or offsite	Not Set ▾	<input type="text"/> - +	0 - 0	<input checked="" type="checkbox"/> All	
Wash Windows Blinds	Not Set ▾	<input type="text"/> - +	0 - 0	<input checked="" type="checkbox"/> All	

Editing Care Plans

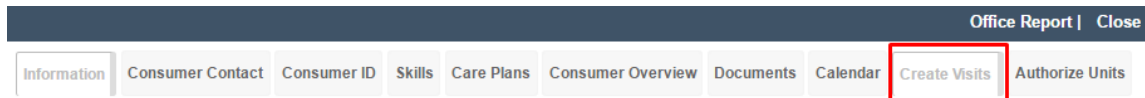
The steps to edit care plans are...

1. Click "Clients," select the client, click the "Care Plans" tab and Select the care plan (by clicking the "plan name").
2. You'll see the items presently on the plan. Click "Update" and you can check new items or uncheck no longer needed items. Then click "Assign Selected Items".
3. When you see the items, you can optionally set the days of the week and or the number of times per week and add notes.
4. Click "Save Plan".

Creating a Visit with Patterns

Now we have established our Patient, entered their authorized units and care plan items, it is now time to set visits with patterns.

1. Select the **Create Visits** tab in the Patient screen



2. Select "Create Visits with Patterns"
3. Select "Add Another Week"
4. Check the days for the visits, set visit type and assign a Caregiver. Note that you need to "add another line" for each change in program or Caregiver.
5. Then select "save all patterns"
6. Go to the bottom of the screen and select "create visits" (e.g., for 3 weeks or ongoing).
7. X-out when done.
8. Select "OK" this will take you to the client's record. Click on Care Plan and Add a Plan (save with client's name).
9. Choose the items in each applicable area of the care plan and select Save.

NOTE: You should mirror the CyberAccess plan of care from EMOMED.

10. Create Visits with Patterns (Main Menu) – create a row for each unique combination of worker, times and visit type. This "Creates the Pattern."
11. Then go to the bottom of the screen to "Apply the Pattern" (for a date range.) If visits already exist the system will warn you to either "delete old visits" or "keep old visits" and add new ones.

Editing a Schedule

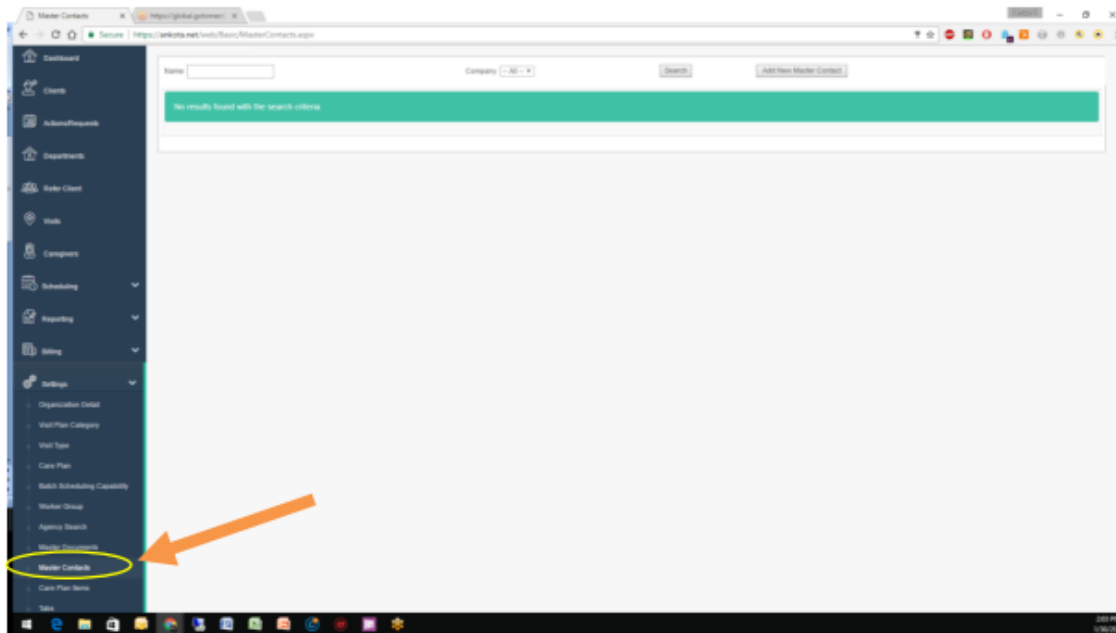
To edit your schedule...

1. Click "Clients," select the client, click "Create Visits."
2. Click "Edit" next to the pattern, make the change(s) and press "Save all Patterns" on the upper right.
3. Scroll down and uncheck "Create Ongoing Visits".
4. Set the start date to the date that the change goes into effect (it will default to "today").
5. Set the end date to the end of the patient's certification period (tip: this will be showed on top of the screen).
6. Click "Create Visits".
7. You will get a warning that says that there are future visits, and it will give you the choice of DELETING the future visits. Make the selection that you want to DELETE the future visits.

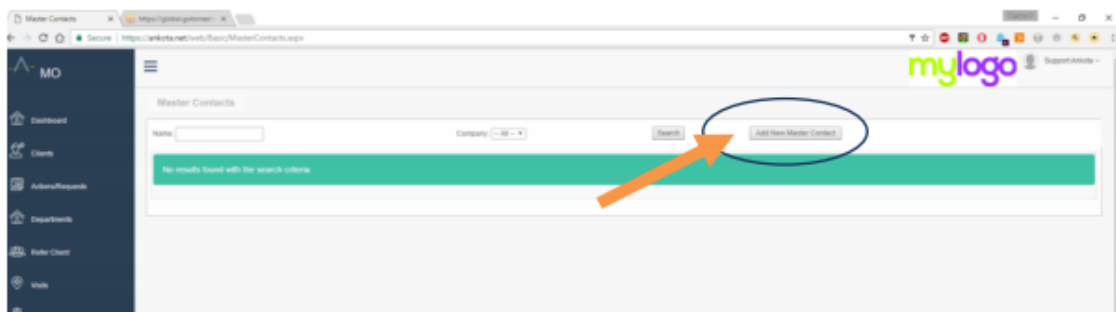
Adding A Caregiver to the Family Mobile Application

To add a Caregiver to the Family Mobile Application, follow these steps:

1. From the Main Menu select **Settings** -> **Master Contacts**



- a. Click on **“Add New Master Contact”**.



- b. The **Contact Information** screen will appear...

Contact Information Close

Information Overview Pricing Tables User Settings

Contact ID:

Type: ☒ Person ☐ Company

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Relationship:

Contact Preference:

Finance ID:

Parent Org:

Organization:

Location:

☐ Authorization for data sharing

Addresses												Add
Facility/Company	Address 1	Address 2	City	State	Zip Code	County	Type	Status	Start Date	End Date	Order	

Emails			Add	Phones					Add
Email	Type	Message		Phone	Extension	Type	Order	Note	

- c. Complete the **Information** tab.
 - i. Contact ID – Give the contact a unique ID the system can reference.
 - ii. Enter a First Name and a Last Name.
 - iii. Set the Relationship from the drop down menu. If the exact relationship is not on the list, use something similar (e.g., for Caregiver use Case Manager).
 - iv. Enter addresses, email addresses and phone numbers where shown.
- d. Click on the **User Settings** tab.

The screenshot shows a 'Contact Information' form with a dark blue header and a 'Close' button. Below the header are four tabs: 'Information', 'Overview', 'Pricing Tables', and 'User Settings'. The 'User Settings' tab is highlighted with an orange circle. The form contains the following fields and options:

- User Template: Inherit from Organization (dropdown menu)
- ☒ Create User
- User Name: [text input field]
- Password: [text input field]
- Confirm Password: [text input field]
- Save User Settings (button)

- i. Select “Inherit From Organization”.
 - ii. Enter a User Name (example: first name initial+last name).
 - iii. Enter a **Password**. Type the **Password** again to confirm it.
 - iv. Click on “**Save User Settings**”.
2. Once a Caregiver has been added as a Master Contact, link them to the appropriate Patients, as follows:

- a. From the Main Menu select **Clients**.
- b. Search for the desired Client using the filters, or just click on **Search**.

The screenshot shows the 'mylogo' web application interface. On the left is a dark blue sidebar with a menu. The main area displays a 'Clients' page with search filters and a table of client data.

Search filters include:

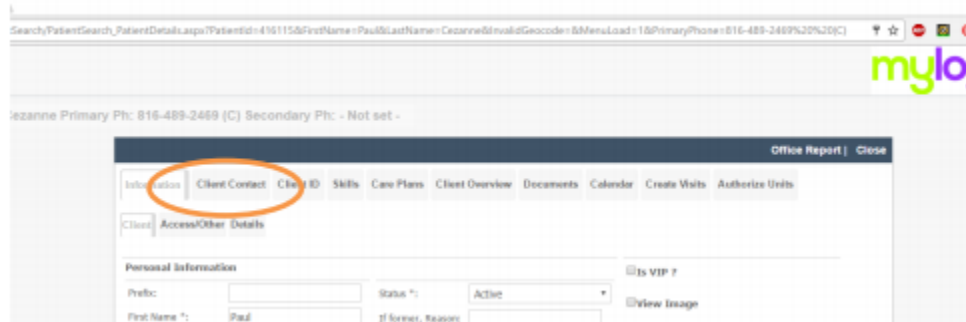
- Filter: [text input field]
- Client ID: [text input field]
- Client Status: [dropdown menu]
- Results Per Page: [dropdown menu]
- Buttons: Search, Add New

The table contains the following columns: ID, EA, LAST Name, FIRST Name, Status, Primary Phone, Secondary Phone, City, State, Agency, Sex, Client ID, and a set of action icons (plus, minus, refresh, etc.).

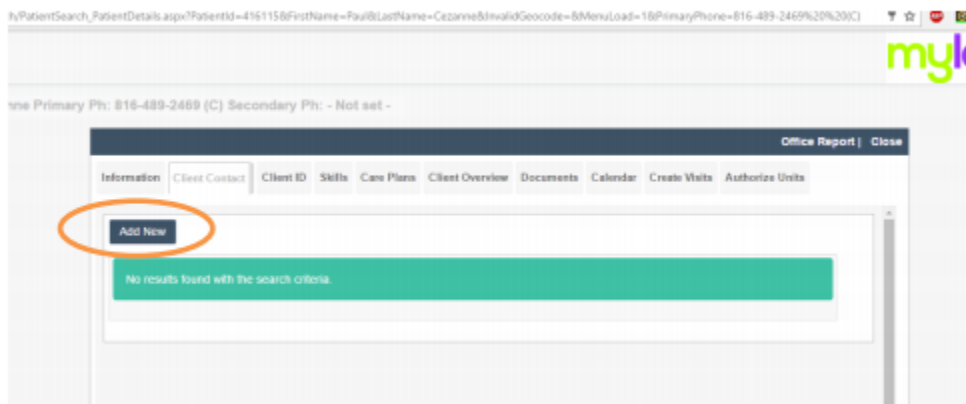
ID	EA	LAST Name	FIRST Name	Status	Primary Phone	Secondary Phone	City	State	Agency	Sex	Client ID	Action Icons
12	New	Adams	Walter	Active	916-888-0000 (2)		Kansas City	MO	220-843	F	MO201802-01001	[Icons]
12		Coxsack	Paul	Active	916-888-0000 (2)		Kansas City	MO	949-943	M	1980200	[Icons]
12	Change	Wright	Wright	Active	916-888-0000 (2)	916-888-0000 (2)	Lawrenceville	GA	949-943	F	1980200	[Icons]
12	New	Clark	Conner	Active	916-888-0000 (2)		Kansas City	MO	220-843	F	1034	[Icons]
12	New	Clark	Conner	Active	916-888-0000 (2)		Kansas City	MO	220-843	F	1034001	[Icons]
12	New	Conner	Paul	Active	916-888-0000 (2)		Independence	MO	220-843	F	MO201802-01001	[Icons]
12	Old	Salerno	Salerno	Active	916-888-0000 (2)	916-888-0000 (2)	Kansas City	MO	949-943	M	2210100	[Icons]
12	Salerno	Salerno	Salerno	Active	916-888-0000 (2)		Independence	MO	949-943	F	1034001	[Icons]
12	Deagan	Wright	Wright	Active	916-888-0000 (2)		Independence	MO	949-943	F	1034001	[Icons]
12	Deagan	Wright	Wright	Active	916-888-0000 (2)		Blue Springs	MO	949-943	F	1034001	[Icons]
12	New	Paul	Paul	Active	916-888-0000 (2)		Kansas City	MO	949-943	F	1034001	[Icons]
12	New	Paul	Paul	Active	916-888-0000 (2)		Kansas City	MO	220-843	M	1980200	[Icons]
12	Salerno	Salerno	Salerno	Active	916-888-0000 (2)		Kansas City	MO	949-943	M	1034001	[Icons]
12	Salerno	Salerno	Salerno	Active	916-888-0000 (2)		Kansas City	MO	220-843	F	MO201802-01001	[Icons]

- c. Select the desired Client by clicking on their first or last name.

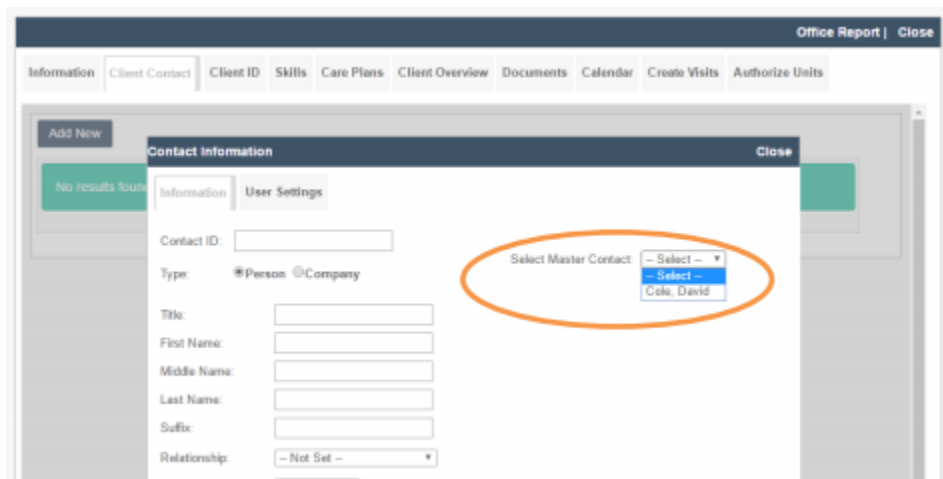
- d. When the Client's electronic health record appears, click on the **"Client Contact"** tab.



- e. Click on **"Add New"** to add a new Contact to the Client...



- f. When the blank Contact Information screen appears, Click on the drop down box marked **"Select Master Contact"** and select the desired Caregiver.



- g. Scroll down to the bottom of the screen and click on **“Save Contact.”**

arch_PatientDetails.aspx?PatientId=416115&FirstName=Paul&LastName=Cezanne&InvalidGeocode=0&MenuLoad=1&PrimaryPhone=616-485-2469%20%20C

Middle Name:

Last Name:

Suffix:

Default Relationship:

Contact Preference:

Is Client? ☐

Finance ID:

Parent Org:

Status:

Priority:

Custom Relationship:

Note:

☒ Make Master Contact

Organization:

Location:

☒ Authorization for data sharing

Addresses Add

Facility/Company	Address 1	Address 2	City	State	Zip Code	County	Type	Status	Start Date	End Date	Order

Emails Add

Email	Type	Message
david.cole@hhaexchange.com	Work	Send E-mail

Phones Add

Phone Extension	Type	Order	Note

Scheduling

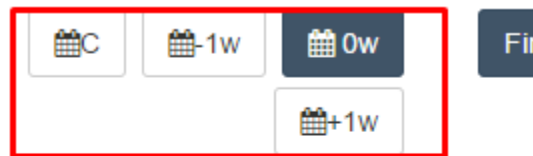
The Dispatch Board

The Dispatch Board (or Scheduling Board) is a versatile tool in Ankota that you will likely work with daily. On a macro level, the screen presents a color-coded schedule of each client and caregivers visits for the week.

- On the top section of the Dispatch board, the dial-in number your team will use to report Visits is presented to the left.

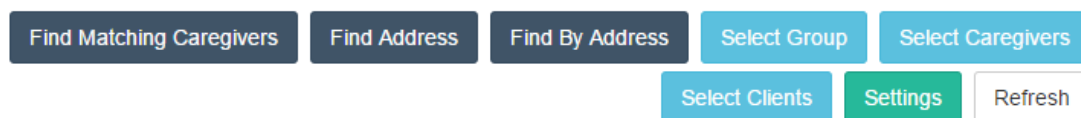
Dial-In number: 855- 258-1555	Mon, 10 Apr	Tue, 11 Apr	Wed, 12 Apr	Thu, 13 Apr	Fri, 14 Apr	Sat, 15 Apr	Sun, 16 Apr
	8:00 AM-9:30	8:00 AM-11:15	8:00 AM-9:30 AM	8:00 AM-11:15	8:00 AM-9:30 AM	8:00 AM-11:15	8:00 AM-11:15

- You can move forward or back a week by using the -1w/+1w function or use the calendar icon to pick a specific time frame.



Dial-In number: 855- 258-1555	Mon, 10 Apr	Tue, 11 Apr

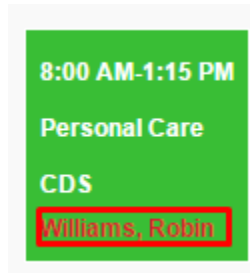
- You will also see a menu cluster with a series of functions such as “Find Matching Caregiver, Find by Address, Select Caregivers, and beyond.



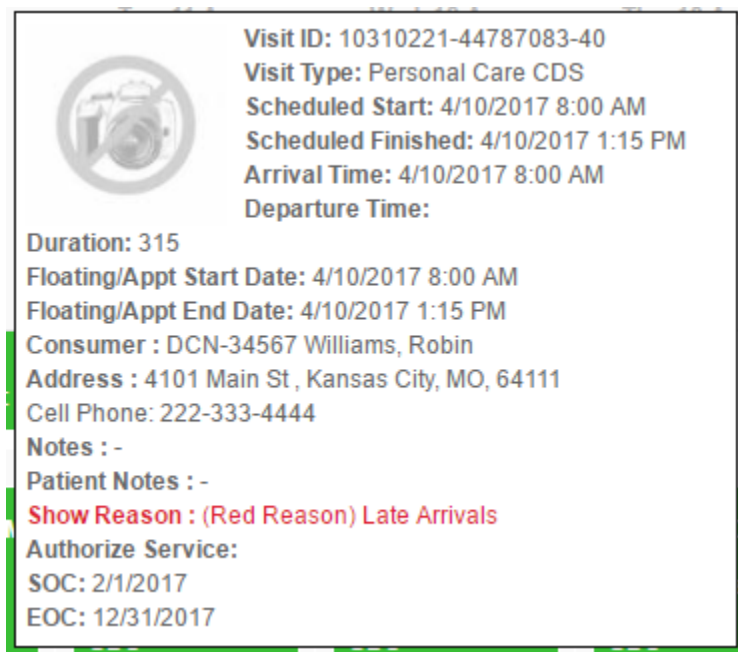
Calendar Alerts

Unclosed Visits

In the calendar section, if you see a Client's name in red, this is an alert letting you know that there is something for you to investigate happening with the visit.



Hover your mouse over the name to see the information about the visit, in particular, the specific reason for the alert.



Closed Visits

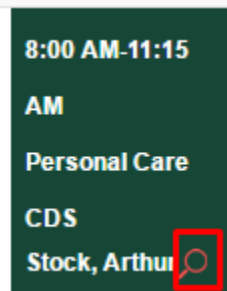
When a visit is closed but there is an issue that violates one of your business rules, magnifying glass will appear after the Client's name in the Visit block. Magnifying glasses allow quick glance to identifying issues with a clock in.

A red magnifying glass represents a problem with the visit.

Reasons could be:

- Duration is +/- _minutes from scheduled duration.
- Mobile – Non departure GPS location > _miles difference.
- Phone number is different than the expected value.

To review the issue click on the red magnifying glass.



A new tab will open with all the details of the visit.

Visit Detail Report

Consumer Name: Arthur Stock
Caregiver: Field, Sally

Care Plan: Not Set
Visit Type: Personal Care CDS

Arrival Date/Time: 04/11/2017 04:18 PM
Departure Date/Time: 04/11/2017 04:20 PM

Scheduled Arrival Date/Time: 04/11/2017 08:00 AM
Scheduled Departure Date/Time: 04/11/2017 11:15 AM

Billing Arrival Date/Time: 04/11/2017 04:18 PM
Billing Departure Date/Time: 04/11/2017 04:20 PM

Payment Arrival Date/Time: 04/11/2017 04:18 PM
Payment Departure Date/Time: 04/11/2017 04:20 PM

Travel Time: 0 minutes
Travel Mileage: 0 miles

Admin Time: 0 minutes
Errand Miles: 0

Visit Time: 0 hours 2 minutes
Visit Status: Needs Approval

Billable Time: 0 hours 0 minutes
Payable Time: 0 hours 2 minutes

Visit Notes:

Save Visit Details

View History

Approval Notes

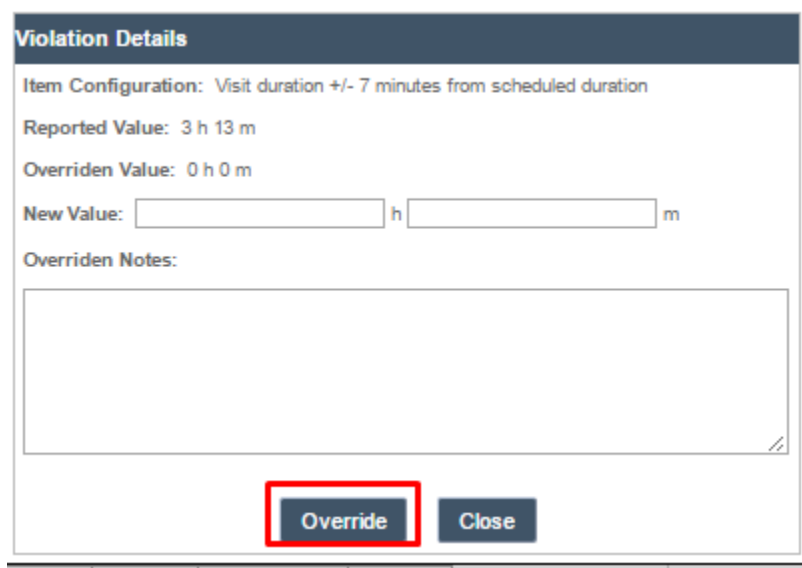
Visit Items:

Item Description	Reported Value	Expected Value	Violation	Overriden	Overriden Value	Override By	Override Date	
Bathing			No	No				Override
Clean Bath			No	No				Override
Dressing and Grooming			No	No				Override
Laundry			No	No				Override
Wash Dishes			No	No				Override
Mobility / Transfer			No	No				Override
Visit duration +/- _minutes from scheduled duration	3 h 13 m	0 h 7 m	Yes	Yes	0 h 0 m	Ankota, Support	4/14/2017 12:44:41 PM	Override
Mobile - Non departure GPS location > _miles difference	728.541	0.03	Yes	No				Override

The issues creating the red magnifying glass will be recorded in red text as show in the above example.

Click “Override” to manually adjust the errors.

NOTE You can do this for each exception.



Violation Details

Item Configuration: Visit duration +/- 7 minutes from scheduled duration

Reported Value: 3 h 13 m

Overriden Value: 0 h 0 m

New Value: h m

Overriden Notes:

Override **Close**

Then to approve the Override, click “Approval Notes”.

Consumer Name:	Arthur Stook	Caregiver:	Field, Sally	
Care Plan:	Not Set	Visit Type:	Personal Care CDS	
Arrival Date/Time:	04/11/2017 04:18 PM	Departure Date/Time:	04/11/2017 04:20 PM	View History
Scheduled Arrival Date/Time:	04/11/2017 08:00 AM	Scheduled Departure Date/Time:	04/11/2017 11:15 AM	
Billing Arrival Date/Time:	04/11/2017 04:18 PM	Billing Departure Date/Time:	04/11/2017 04:20 PM	
Payment Arrival Date/Time:	04/11/2017 04:18 PM	Payment Departure Date/Time:	04/11/2017 04:20 PM	Approval Notes
Travel Time:	0 minutes	Travel Mileage:	0 miles	
Admin Time:	0 minutes	Errand Miles:	0	
Visit Time:	0 hours 2 minutes	Visit Status:	Needs Approval	
Billable Time:	0 hours 0 minutes	Payable Time:	0 hours 2 minutes	
Visit Notes:	<div></div>			
	Save Visit Details			

Visit Items:

Item Description	Reported Value	Expected Value	Violation	Overridden	Overridden Value	Override By	Override Date	
Bathing			No	No				Override
Clean Bath			No	No				Override
Dressing and Grooming			No	No				Override
Laundry			No	No				Override
Wash Dishes			No	No				Override
Mobility / Transfer			No	No				Override
Visit duration +/- _ minutes from scheduled duration	3 h 13 m	0 h 7 m	Yes	Yes	0 h 0 m	Ankota, Support	4/14/2017 12:44:41 PM	Override
Mobile - Non departure GPS location > _ miles difference	728.541	0.03	Yes	No				Override

Consumer Message

A pop up will appear to allow an “Approved Reason” drop down menu and notes.

Approval Notes/Comments

Close

Approved By:

Approved Date: 11/30/2016

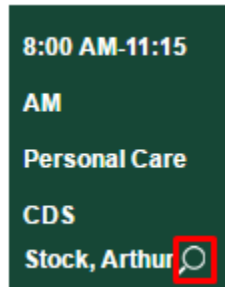
Approved Reason: -- Select Reason --

Notes:

Approve

Click “Approve” to save.

After the exceptions have been approved, the magnifying glass on the Schedule Board will turn white. This will indicate that there was an exception with this visit, but it has been resolved.



If you scroll down to the bottom of your screen, it will give you a color-coded count (in real time) of the status of each visit. It will illustrate the count of statuses including Arrived, Departed, Closed, Canceled, Door Tag, and so on.

Arrived	Closed	Scheduled	Canceled	Departure	On Hold
22	36	22	1	1	1

Find Matching Caregiver

“Find Matching Caregivers” can be found under the Scheduling tab in the Main Menu. This feature will help you find the best fit for a client based upon selected parameters.

1. Selected “Find Matching Caregivers”.
2. Select the check box by “Use Consumer” select a Consumer.

New Search Saved Searches

☒ Use Consumer

Visit Details

Visit Type:

Duration*: (hours) (minutes)

Start Date*: :

☐ Use Interval

☐ Specify Days

☐ Include additional skills

☒ Include caregivers with no scheduled hours

☐ Use Caregiver Rating

Caregivers Status:

Number of Matches:

Gender:

Sorting:

Find matching caregivers Save Search

3. Select a visit type.
4. Choose the start date (and time if applicable).
5. Select any other parameters including:
 - a. Miles, Caregiver Status, Gender
6. Sort by either proximity then caregiver preference or skill then proximity.
7. Click “Find matching caregivers”.

9. From here you have the ability to assign or you may send a mass text message and the first person who responds will receive the assignment.
10. To send a message, select the caregivers names who you would like the message to be sent by clicking the check box before their name.
11. Select "Send SMS".
12. A message will pop up. You can either edit it by typing in the Message box or send as it is by pressing "OK".
13. Once a clinician accepts the visit, it will be assigned to them.

[Creating Visits from a Time Sheet That Were Never Scheduled](#)

To create visits from a Time Sheet that were never scheduled:

1. Click on "Create Visits" under the left menu -> scheduling.
2. Search for the client and select them.
3. Fill in the following:
 - a. Visit type
 - b. Duration
 - c. Attendant
 - d. Date
 - e. Status (usually "scheduled" but you can make it closed)
 - f. Occurrence: one visit*
 - g. Start time
4. Press save on the bottom.

* For creating multiple visits at once, you can change "One occurrence" to "Repetitive Appointment" and set the parameters (such as "Daily for 5 days").

Visits

The Visits screen is a powerful tool enabling you to view, cancel, map, add notes, and change the status of visits assigned to you.

This screen has numerous filters ranging from Visit Dates, Visit Status, Visit Types, and more. These functions allow you to organize and parse out a wide variety of data pertaining to Visits.

Search for Visits

Note: Query return maximum 100 records per search.

Visit Date	<input type="text" value="04/06/2017"/>	Member ID	<input type="text"/>	City	<input type="text"/>	<input type="button" value="Search"/>
Visit Start Date	<input type="text"/>	Member First Name	<input type="text"/>	State	<input type="text"/>	
Visit End Date	<input type="text"/>	Member Last Name	<input type="text"/>	Postal Code	<input type="text"/>	
Visit Name	<input type="text"/>	Case Manager	-- All --	Zone	-- All --	
Visit Status	-- All --	Company Name	<input type="text"/>	Member Status	-- All --	<input type="button" value="Print Selected Visits"/>
Visit Number	<input type="text"/>	Time Interval	12:00 AM - 11:59 PM	Distance from Branch	<input type="text"/>	
Visit Type	-- All --	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday				
Referring Org:	-- All --	<input type="checkbox"/> Show only visits with documents marked for review <input type="checkbox"/> Show only reviewed visits Results Per Page: 20				

1. After applying the filters you desire, click “Search” to view visits that match that criteria you set.

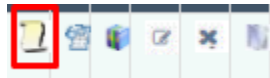
	T.S.	Member ID	Member Name	Assigned Case Manager	Visit Type	Date	ETA	Scheduled Times	Completed	Visit ID	Status			
<input type="checkbox"/>		Test54321	Test, Test	Support, Ankota	F2F Visit	Thu, 6 Apr 2017	02/10/17, 08:00 AM - 08:00 PM (12.00)	08:00 AM - 08:45 AM (0.75)	08:00 AM - 08:45 AM (0.75)	10113020-14458d3f-0	Closed			

2. At the bottom of the Visit screen, there are series of buttons that execute different functions. We will cover the details of each of these functions in future chapters.
3. By clicking on the check box located on the right side of the data line or lines, you can pick and choose which data line is affected by the action buttons at the bottom of the screen.
4. If you want to Select All visits in a Visit search with more than one visit presented, you can click the check box located on the right side of the top blue bar of your search results.

	T.S.	Member ID	Member Name	Assigned Case Manager	Visit Type	Date	ETA	Scheduled Times	Completed	Visit ID	Status			
		Test54321	Test, Test	Support, Ankota	F2F Visit	Thu, 6 Apr 2017	02/10/17, 08:00 AM - 08:00 PM (12.00)	08:00 AM - 08:45 AM (0.75)	08:00 AM - 08:45 AM (0.75)	10113020-14458d3f-0	Closed			

[Cancel Visits](#)
[Cancel Assignments](#)
[Set Scheduled Date/Times](#)
[Map Visits](#)
[Add Notes](#)
[Change Status](#)

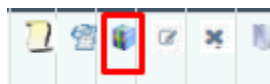
5. You can view Visit Status History by clicking on the following icon to the right of the columns (Please note that your environment may not include all icons listed below):



6. Once you click the above icon, the following information box will appear, reporting the details such as Scheduled Date, Caregiver clock-in/clock out, and so on:

Visit Status History			Close
Status	Modified Date	Modified By	
Scheduled	26 Oct 2016 08:44 AM		
Scheduled	27 Oct 2016 09:50 AM		
Scheduled	11 Nov 2016 01:30 AM	Support Ankota	
Scheduled	28 Mar 2017 09:37 AM	Debbie Wanke	
Scheduled	3 Apr 2017 12:48 PM	Debbie Wanke	
Scheduled	5 Apr 2017 11:10 AM	Debbie Wanke	

7. Any documents attached to the visit can be viewed by clicking this icon:



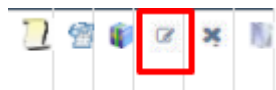
8. Once clicking that icon, you can view documents previously or add a new document to the visit.

Documents

Date:

No results found with the search criteria.

9. The fourth icon in this cluster is called the Edit button:



10. By clicking this icon, you can view and update details about the visit:

Details 104388131 Carter, Eddie

Close Details

Visit ID:*

104388131170327PC

Visit Type:*

Phone Call & Scheduling Nichols

Duration:*

0 (hours) 20 (minutes)

Preferred Case Manager:

Wanke, Debbie

Status:

Scheduled

Start Float Date:

04/03/2017 8:00 AM

End Float Date:

04/07/2017 8:00 PM

Scheduled Time:

04/07/2017 8:00 AM

Repeated Visit?

☐

Reconciled?

☐

Notes:

Visit already scheduled 4/4 @ 1:30

Address:

Enter An Address

Visit Address: 925 Euclid Ave, #550, Cleveland, Ohio, 44115, Lat: 41.50034, Long: -81.68845

Street Address *:

925 Euclid Ave

Street Address 2:

#550

City *:

Cleveland

Country *:

USA

State/Province *:

Ohio

Zip Code/Postal Code *:

44115

Longitude:

-81.68845

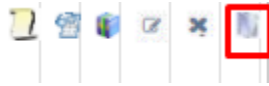
Latitude:

41.50034

Localize Address

Update Visit Detail

The 6th icon in this example allows you to adjust tasks that caregivers completed (usually drawn from their paper timesheets).



1. Go to Visits and search for the visit you'd like.
2. to the far right on the line, you'll see the last icon.
3. When you click that icon, a box will pop up that will allow you to make changes to the tasks via the drop down menus.

4. Be sure to click “Report Items” at the bottom of the popup before you close the window.

Changing the Dates of Visits

The steps to take in order to change the dates of visits are as follows: (to reschedule - also used to move accumulated minutes visits to days when client was in service).

1. Go to Visits Screen.
2. Search for the visit(s).
3. Select with the check box on the left.
4. Press Set Scheduled Date/Times on the bottom.
5. Change the date(s)/time(s).
 - a. Note that there's a "tool" at the bottom of the screen to update all selected dates/times of both at once. Let's say you have some visits usually done at 8:00 AM and you want to move them all to 10:00 AM but keep their dates. At the bottom, set 10:00 AM and in the drop down choose time, and then apply.
 - b. Another example is move all nurse visits on a Monday holiday to the Tuesday. In this case use the tool at the bottom to set the date you want to move the visits to, select date from the drop down and apply.
 - c. Note that if you make a mistake applying a mass update, simply cancel and start over
6. Press Save.

Visit Verification

Important Concepts: What is IVR and EVV?

Two key features in Ankota the use of IVR and EVV. IVR stands for “Interactive Voice Response” and EVV stands for “Electronic Visit Verification”.

Caregivers use IVR via telephone or tablet/smartphone device to record in the Ankota system their clock in/clock out times, completed tasks, and notes for their client and consumer visits.

Clocking In/Out for Visits

Ankota offers a few ways for Caregivers to record EVV (Electronic Visit Verification), tasks and hours worked. Workers in the field can report their clock in and clock out times, task completion, notes and location with Ankota in three ways:

- Signing in to the Ankota app via smartphone or tablet device.
- Dialing in on the phone (referred to as telephony).
- Utilizing a FOB (“Fixed Object”) device mounted in the clients home.

Using Telephony

- Dial the phone number provided by Ankota.
- Enter Employee ID for user ID and PIN.
- Follow prompts.

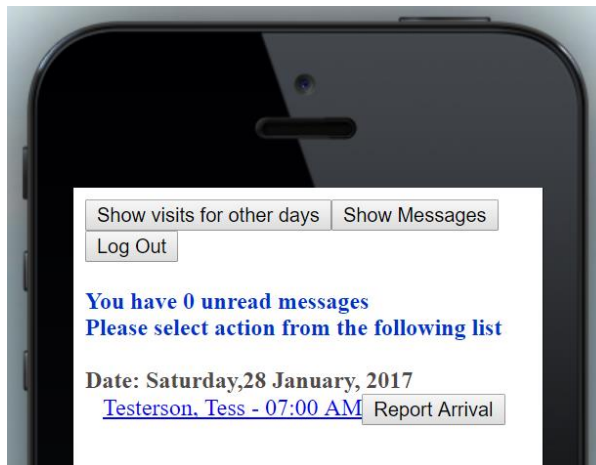
Using the App

As technology progresses, more folks are using smartphones or tablet devices in their daily lives and at work. Ankota’s mobile app is an easy way for Attendants/Caregivers to report and track their daily visits. The steps are as follows:

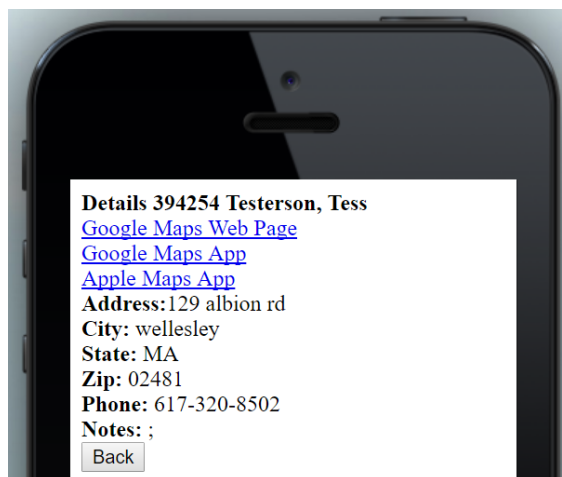
1. Go to a browser on your phone (e.g., Android, iPhone, etc. but also works on a computer or tablet) and go to [Ankota.net/<your Organization abbreviation>](#)



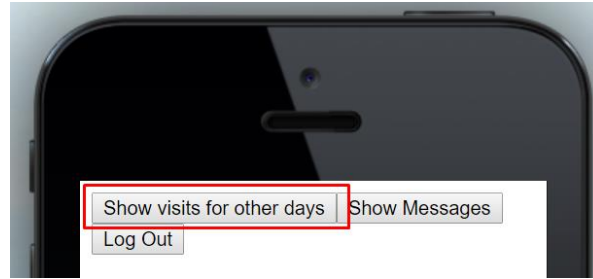
2. Login with the same numeric ID and PIN that you use for EVV telephony. You'll then see your visits for today:



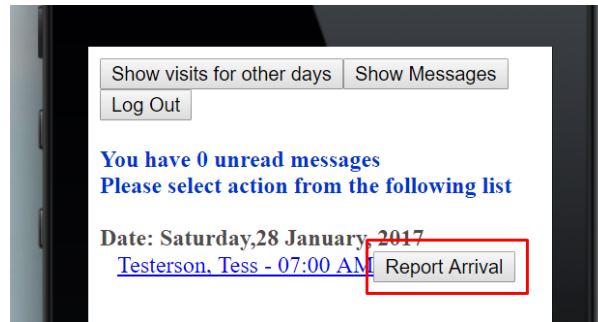
3. If you click on the name of the consumer/client, you'll see their name and phone number and you can get directions:



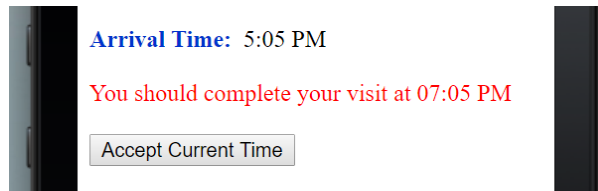
4. If you want to see your upcoming schedule, click on Show Visits for other days:



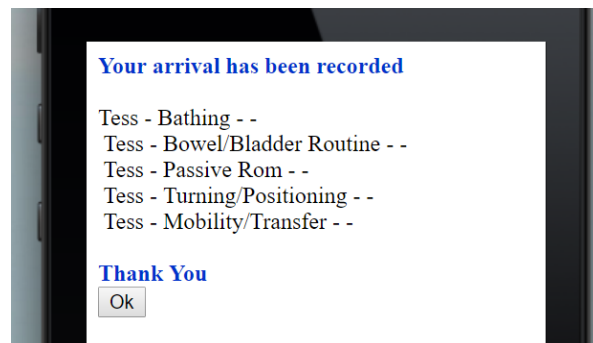
5. You can also use this app to clock in and clock out for EVV. Click Report Arrival. The first time that you do this, the app will ask you to share your location. PLEASE ALLOW THIS:



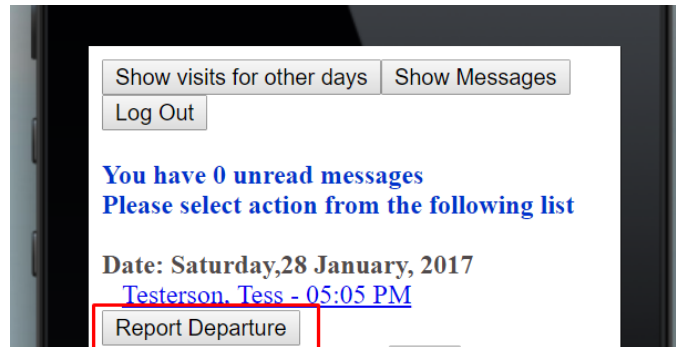
6. This is what you'll see. It will tell you what time to clock out to complete your full shift:



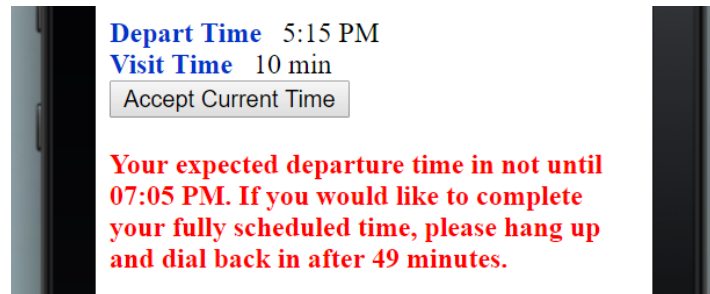
7. The system will also display your tasks:



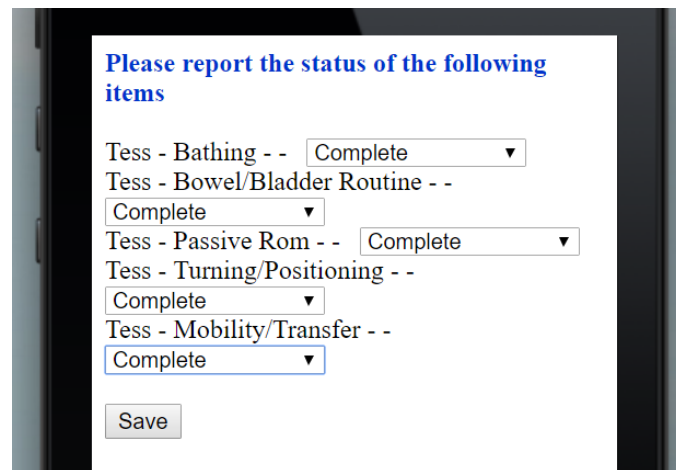
8. At the end of your visit, you can report your departure:



9. You'll get a warning if you're clocking out early:



10. You can report your tasks from the dropdowns listed:



11. You can enter notes (optional) and need to press "Save" when done:

Please enter notes.
Notes.

Would you like a supervisor to follow up with you on this visit ?
Follow-Up requested No ▾
Visit Status Close Visit ▾

Save

12. You'll get a thank you message. Please press "OK".

Your departure has been successfully reported.
Thank you!

OK

13. Once you've reached this step, the visit will no longer show up on your menu. If you see multiple clients during the day, they will disappear as you complete them:

Show visits for other days Show Messages
Log Out

You have 0 unread messages
Please select action from the following list

There are no calls.

Using a FOB

Before you send a FOB to a client's home, record the 10 digit FOB ID (the number underneath the barcode) and the clients name and email that to Support@ankota.com. Ankota will associate the FOB with the client.

- When the caregiver sees a client with a FOB, they should do the following:
 - Push the button on the FOB and record the six-ten digit ID when they arrive.
 - Push the button on the FOB and record the six-10 digit ID when they depart.
 - When they are able, dial into the dedicated Ankota toll free number.
 - They will be prompted for the FOB ID that was used when they arrived and their arrival will be recorded.**
- Dial in again to report departure. They will be prompted for the FOB number that was recorded at their time of departure and will also need to update the status of the care plan items that they completed.**

The system will look up the FOB times for the client based on the codes entered and substitute the arrival and departure times.

Here's an example of the process:

- Caregiver arrives at 1:58 PM for Mary Smith, they get the number from the FOB and write it down.
- Caregiver departs at 4:00 PM for Mary Smith, they get the FOB number another number from the FOB and write it down.
- They stop into the office on their way home and dial in their arrival and departure at 4:20 PM and 4:22 PM. Based on the FOB numbers, their visit is recorded from 1:58 PM to 4:00 PM. (8 completed units)

* This is a temporary procedure. There will be a new procedure effective on for entering the 10 digit FOB ID.

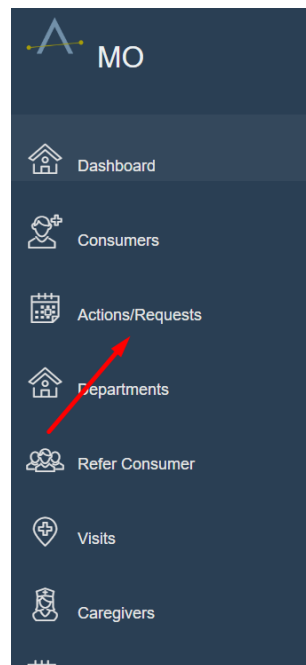
** The reason they dial in for arrival and departure is because some attendants/caregivers may be able to dial-in from the client's home. We will know when they dialed in, but we will substitute the FOB times.

Actions/Requests

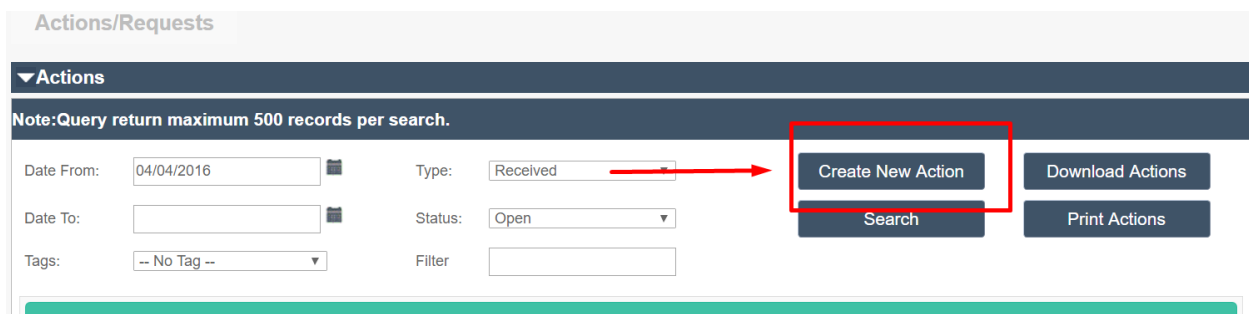
Messaging a Caregiver via Telephony or Mobile app

Communicating with your workers in the field while you are in the office via telephony or Ankota's mobile app is a convenient way for your agency to keep in touch with your caregivers.

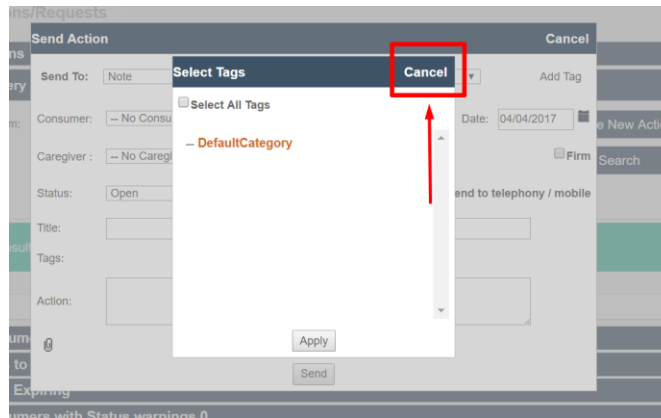
1. Sign into your Ankota system and click the "Action/Request" button in the menu.



2. You will be taken to the Actions/Request screen. Once there, click the "Create New Action" button, illustrated here:



3. A “Select Tags” box will appear and you can click “Cancel.” Tags are a concept that will be covered in a future chapter.



4. The screen pictured below will appear. The next step is to choose who you are sending the message to. Choose from the options in the 2 drop-down fields illustrated below.

A screenshot of a software interface showing a 'Send Action' form. The form has a title bar with 'Send Action' and 'Cancel' buttons. Inside, there's a 'Send To:' field with a dropdown menu, a 'Consumer:' field with a dropdown menu, a 'Caregiver:' field with a dropdown menu, a 'Status:' field with a dropdown menu, and a 'Title:' field. There's also a 'Tags:' field with a list of tags, including 'DefaultCategory'. A red box highlights the 'Send To:' and 'Consumer:' fields. A red arrow points from the 'Send To:' field to the 'Consumer:' field. The background shows a sidebar with 'Actions/Requests' and a main area with 'No results' and 'Consumers with Status warnings 0'.

5. Be sure to check the box labeled “Send to telephony/mobile.” Entering in a message title is a required field, so type in a title in the “Title” field and the content of your message in the Action field.

Once those steps are complete, click the “Send” button.

Send Action Cancel

Send To: Caregiver Aniston, Jennifer Add Tag

Consumer: -- No Consumer -- Show All **Date:** 04/04/2017

Caregiver : -- No Caregiver -- Show All Firm

Status: Open

Title: Message Title Here

Tags:

Action: Hi Jennifer, Keep up the great work! Thanks, Chandler

☒ **Send to telephony / mobile**

Send

6. From the Caregiver side of the process, once the message has been sent, they can log into the mobile app with their User ID Number and Pin Number to retrieve their message(s).

User ID Number

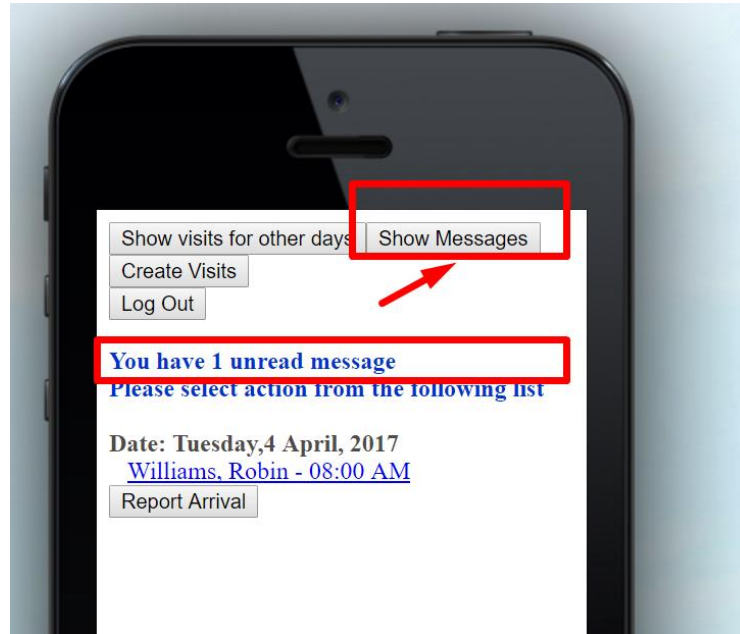
120

PIN Number

...

Login

7. Once the caregiver is logged in, they will see an alert letting them know that they have a message. They then need to click the “Show Messages” button to view:



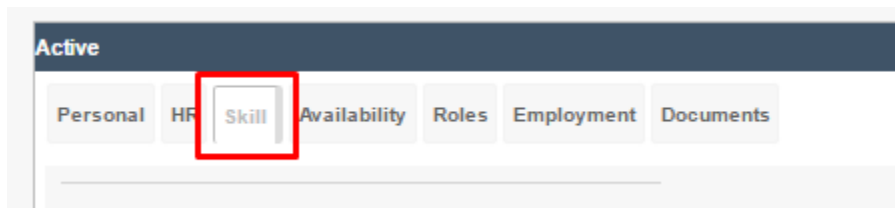
Setting Reminders for Reviews

Different agencies have different policies for this, including:

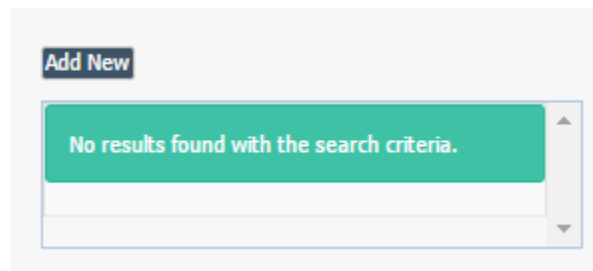
- Check all caregivers at the same time one month per quarter.
- Check 1/3rd of caregivers each month, based alphabetically by last name.
- Set a reminder for each employee when you need to check them again.
- Set a reminder for each check (not recommended - too much overhead).

Presuming that you would like two reminders per employee, here are the steps:

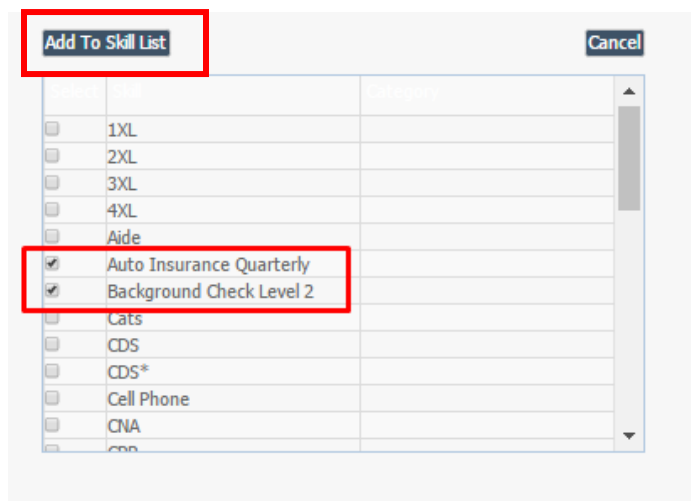
1. Go to the **Skill** tab.



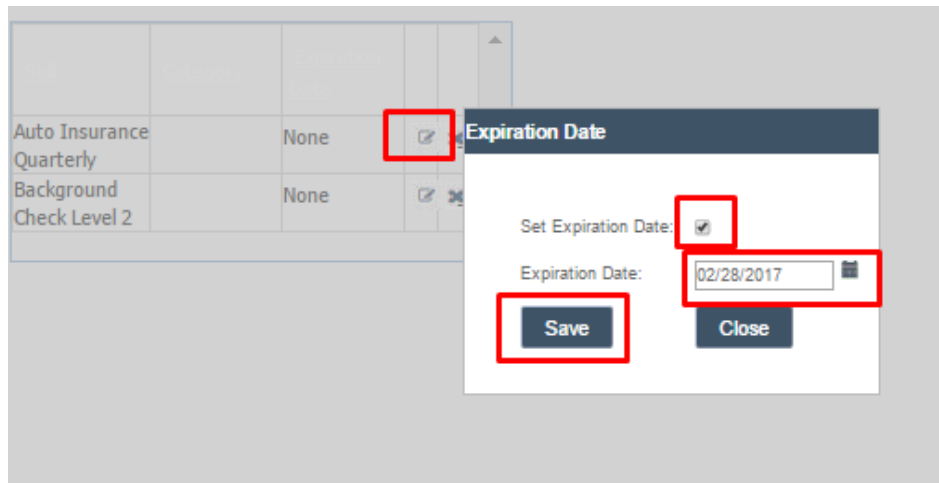
2. Select **Add New**.



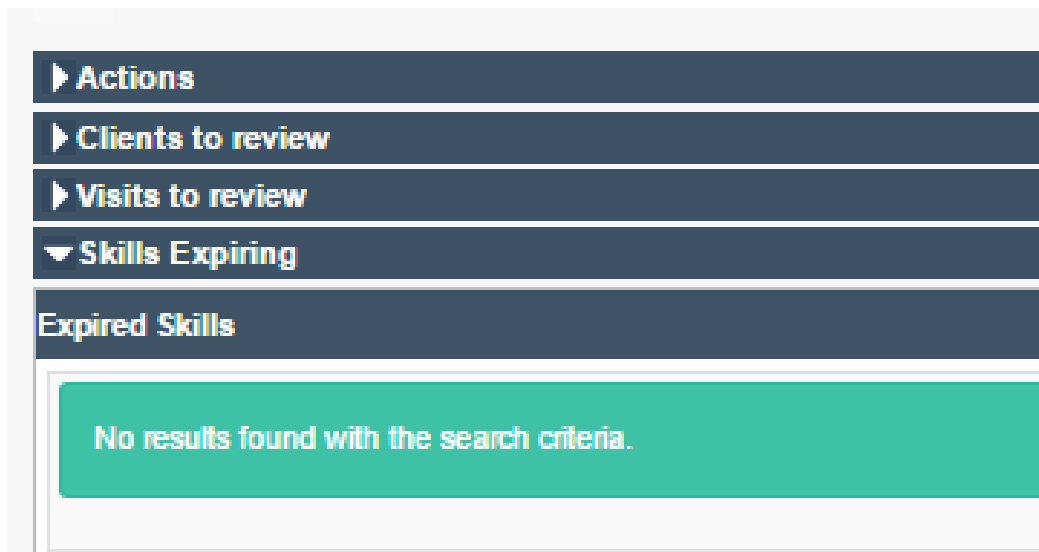
3. Select the one or multiple reminders that you'd like. (If the one(s) you want aren't on the list email support@ankota.com and let us know which ones you'd like to add.)



4. Select **Add to Skill List**.
5. Set the reminder or **Expiration Date** (you will be warned one month in advance.)



6. **Reminders** will be in **Actions/Requests**.
7. Look under "Expired Skills".



Billing

Billing and payroll are byproducts of closed, approved schedules. Thus the processes are nearly identical to run either one.

Ensure All Visits Are Closed

Before you can begin the billing process, you will need to check the billing period for any unclosed visits and any unresolved red magnifying glasses and resolve the issues. If there are unclosed visits (scheduled, arrived or on hold) they will not bill or pay and you can pick them up in the next round. (Please refer to section "[Calendar Alerts](#)")

Calculate Billing

1. Go on the main menu, choose **Billing** and choose **Calculate Billing and Payroll**
2. Click the following:
 - a. Billing (vs. Payroll)
 - b. Date Range (you can set the start date far into the past to pick up any unbilled visits from the last cycle).

NOTE We will never bill for the same visit twice

Therefore, you can set the start date for the billing period to an earlier date if needed

3. Preview the closed visits and scan for issues such as a zero rate and then investigate. Possible issues are as follows:
 - a. Visit times were not correct (would normally result in a magnifying glass on the screen).
 - b. A new service type was introduced and there was not a rate associated.
 - c. For payroll (which is essentially the same process) a new caregiver didn't have a pay rate.
 - d. Once fixed, use the recalculate button and it will pick up any changes.
4. Once the preview is good, press "Create Invoices"

NOTE There is a check box that says "View After Creation" that we can check to be taken to the "created invoice screen"

To get there manually, go into **Billing** from the main menu and then **Billing Report (Client)**

5. On the "Billing Report (Client)" Screen we can view the invoices as PDFs.
 - a. Note also that there's an option "view all as PDFs" that will make a consolidated PDF for you to review on line or print.
 - b. If you see something wrong, we recommend the following approach:
 - i. Cancel the invoice(s) that has errors.
 1. To cancel a single invoice, there's a cancel button on the right.
 2. To cancel many invoices (or all) use the check boxes on the left and press the "cancel" button below.
 - ii. Go back and fix the errors. For example:
 1. go into the visits tab and adjust times or other factors.
 2. If the rate was not set or incorrect, then fix the billing (or payroll) rate and recalculate, then recreate the invoice.
 - c. Once your "draft" invoices meet your expectations, you can move them to "Complete" (either one by one or grouped together).
 - i. To do one at a time, press the "complete" link on the right.
 - ii. To mark many (or all) as complete, select their check boxes on the left and press "complete" down below.

Submit to EMOMED

1. Select the completed invoices (check box them individually or use the top check box to "select all").
2. Press "Export as Healthcare Claim" (NOTE: Please don't press the EXPORT button on the right of the claim - there is a bug here that is being fixed).
3. In your browser a box will appear at the lower left with your downloaded file. Save this file in the location of your choosing.
 - a. One way to do this is to drag the downloaded file to your desktop or to a folder of your choosing with a title like "claims to upload".
 - b. In some browsers, there will be a little arrow to the right of the file name. You can click that and say open file location and then use the Windows File Manager to move it to the location of your choice.

NOTE If you download a single claim the downloaded file will be an .edi file. If you download more than one it will be a .zip file. In either case, this is the file that you'll be uploading to EMOMED.

4. Getting approval from EMOMED for electronic filing:
 - a. Before EMOMED lets you submit, you have to fill out a Trading Partner Agreement and then you will get an email from EMOMED with the following instructions:
 - i. To submit your batch file:
 1. Log on to **www.emomed.com**.
Please note that the User ID stated in the first paragraph of this document must be used to log onto emomed.com to submit the batch file. The Trading Partner Agreement applies only to this specific user account. A Trading Partner Agreement will be required if other users are required to submit a batch file for this approved user. Failure to do so will result in the file being rejected and not processed.
 2. Select "File Management" on the eProvider screen.
 3. Select "Manage Test Files".
 4. Select "Upload HIPAA Test Files".
 5. Select "Browse" – Navigate to select the desired file.

6. Select "Send Files".

Files with status "Ready for Processing" will process in the next run of our Test Cycle. This status will indicate you had a successful upload of your file to emomed.com. Files with status "Processing Finished" are files that have processed through one of the Test Cycle runs.

Our Test Cycle runs at 5:30 a.m. (CST) daily, Monday - Friday. You can review your results from the cycle around 12:00 p.m. the same day.

To Review EMOMED Results

1. Select "File Management" on the eProvider screen.
2. Select "Manage Test Files".
3. Under Search Scope, select "By User ID".
4. Check the box by "Acknowledgements".
 - On the Acknowledgement look for the indicator 'A' (accepted) following the AK9. If you received an 'R' (rejected) after the AK9, look for any IK3 or IK4's within the file. They will direct you to the noncompliant loop and segment.
 - If the 999 is missing, check in Rejects X12. An X12 reject means the file was noncompliant with the first set of processing edits.
 - **Accepted 999 string example:**
 - AK1|HC|582~AK2|837|000000582~IK5|A~AK9|A|1|1|1~
 - **Rejected 999 string example:**
 - IK3|NM1|56||IK4|9||1~IK5|R|5~AK9|R|1|1|0~

If you receive an accepted 999, under Search Scope select All NPIs, check the Claim Confirmation box. If the claims processed and have a status majority of 'I' (To Be Paid), send an email to internethelpdesk@momed.com to move to production. Please include the emomed User ID and the type of file (5010X222A1, 5010X279A1, etc) that you are requesting to be promoted to production.

If the claims processed and all claims have a status of 'K' (To Be Denied), please correct.

The response error codes are listed to the right of each claim. You can obtain the reason code explanation at <http://www.wpc-edi.com/content/view/180/223/> or by clicking on the Provider Information bullet in the External Links section on any of the main tabs (login screen, ePassport or eProvider).

Please contact us at (573) 635-3559 or internethelpdesk@momed.com if you have any questions regarding this process.

[Upload the file to EMOMED](#)

Once approved by EMOMED, the steps to submit your batch file are as follows:

1. Log on to www.emomed.com.
Please note that the User ID stated in the first paragraph of this document must be used to log onto emomed.com to submit the batch file. The Trading Partner Agreement applies only to this specific user account. A Trading Partner Agreement will be required if other users are required to submit a batch file for this approved user. Failure to do so will result in the file being rejected and not processed.
2. Select "File Management" on the eProvider screen.
3. Select "Upload HIPAA Files".
4. Select "Browse" – Navigate to select the desired file.
5. Select "Send Files".

The next morning we'll get confirmation of "approval" or indication of any errors

[Processing EMOMED Remittance Advices \(RA\)](#)

To process a RA, follow these steps:

1. From the Main Menu, select Billing → Accounts Receivable.
2. When the Accounts Receivable screen appears, select program for which you want to process the RA (e.g., CDS). Then click on **Show Invoices**.

The screenshot shows the 'Accounts Receivable' page in the mylogo system. The left sidebar contains navigation links: Dashboard, Clients, Actions/Requests, Departments, Refer Client, Visits, Caregivers, Scheduling, Reporting, and Billing. The main area has filters for Date (02/01/2017), Agency (CDS MO), and Client (All). A 'Show Invoices' button is visible. Below the filters is a table of invoices with columns: Name and InvoiceNb, Date, Amount, Amount Covered, Check Number, Note, Balance, and Att. The table lists several invoices, including 'Client, Connie CDS MO #1' and 'Periwinkle, Polly CDS MO #2'.

This will display a list of the outstanding invoices based on the filters set. The filters that can be set include:

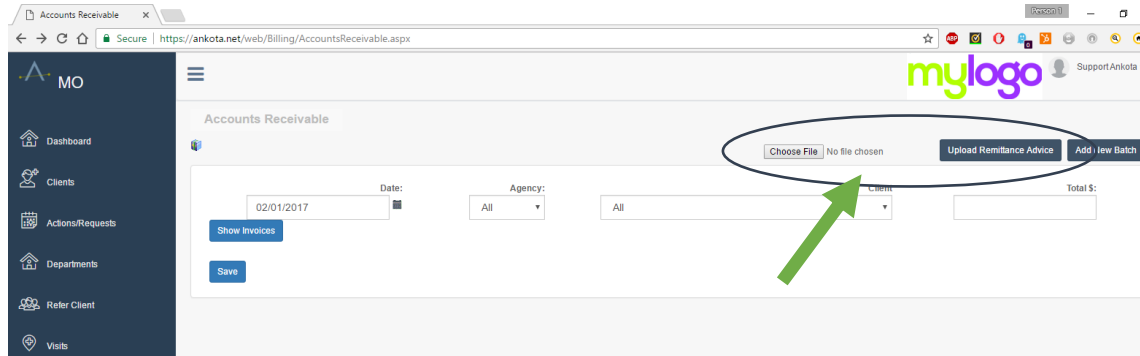
FILTER	DESCRIPTION
Date	The starting date for the invoices to be processed.
Agency	The program for which the remittance advice was received.
Client	A drop list of individual clients

Use the drop down boxes to select the desired filters, then select **Show Invoices** to display the selected group of invoices.

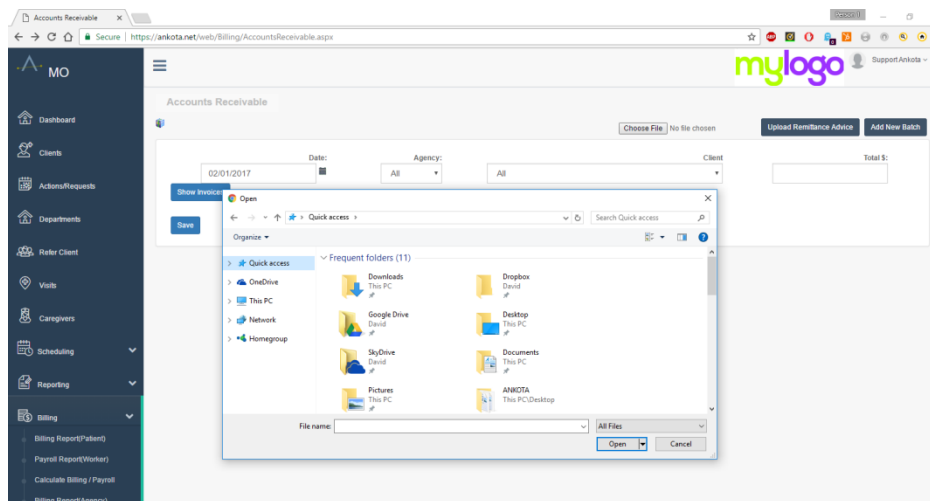
3. Select **Process Remittance Advice**:

This screenshot is similar to the previous one but highlights the 'Process Remittance Advice' button with a green arrow. The button is located in the top right corner of the main area, next to the 'Add New Batch' button. The filters and 'Show Invoices' button remain visible.

- a. The button will change to **“Upload Remittance Advice”** and the Choose File button will appear next to it.



- b. Click on **Choose File** to upload the 485 RA from EMOMED, from the file location in which you receive remittance advice files from EMOMED.



- c. Select the RA file you received from EMOMED.
 - d. Process the file and all invoices will be updated (e.g., Paid, Partially Paid, Denied).
4. Main Accounts Receivable Screen
 - a. The redesigned Main Accounts Receivable screen (release date May 2017) will manage remittances starting from an *invoice aging view* by program.

Program	Current	30	60	90	120	150+	Totals
CDS	\$ 120,000.04	\$ 7,231.44	\$4,442.60	\$1,480.87	\$1,777.04	\$1,248.00	\$136,179.99
IHS	\$ 87,394.67	\$ 8,199.17	\$1,248.00	\$ 416.00	\$ -	\$ 989.44	\$ 98,247.28
VA	\$ 18,213.99	\$ 1,037.00	\$1,354.94	\$ -	\$1,071.07	\$ -	\$ 21,677.00
Private Pay	\$ 31,324.00	\$ 6,709.86	\$2,149.76	\$ 716.59	\$ -	\$1,374.08	\$ 42,274.29
Totals	\$256,932.70	\$23,177.47	\$9,195.30	\$2,613.45	\$2,848.11	\$3,611.52	\$298,378.55

- b. When you click on the name of a program it will break the aging down by patient, as follows:

Program	Current	30	60	90	120	150+	Totals
Client 1	\$ 679.00	\$ 1,067.00	\$1,557.00	\$ 279.00	\$ 9.00	\$ 142.00	\$ 3,733.00
Client 2	\$ 3,420.00	\$ -	\$2,047.00	\$ 404.00	\$ 295.00	\$ 229.00	\$ 6,395.00
Client 3	\$ 2,771.00	\$ 1,795.00	\$ -	\$ -	\$ -	\$ -	\$ 4,566.00
Client 4	\$ 3,656.00	\$ -	\$1,867.00	\$ 159.00	\$ 557.00	\$ 384.00	\$ 6,623.00
Client 5	\$ 1,419.00	\$ 933.00	\$2,017.00	\$ -	\$ -	\$ -	\$ 4,369.00
Client 6	\$ 3,928.00	\$ 1,613.00	\$ -	\$ 578.00	\$ -	\$ -	\$ 6,119.00
Totals	\$ 11,774.00	\$ 4,341.00	\$3,884.00	\$ 737.00	\$ 557.00	\$ 384.00	\$ 21,677.00

- c. When you drill into a client it will take you to a list of all outstanding invoices for that client.

Date: 02/01/2017

Referring Program: CDS MO

Client: Client, Connie

Total \$:

Show Invoices

Name and InvoiceNb	Date	Amount	Amount Covered	Check Number	Note	Balance	Att.
Client, Connie CDS MO #1	10/3/2016	\$0.00	0		Custom note...	0	
Adjustment:		Amount...			Type: ▼		
Client, Connie CDS MO #3	10/12/2016	\$585.46	0		Custom note...	585.46	
Adjustment:		Amount...			Type: ▼		
Client, Connie CDS MO #5	11/7/2016	\$477.19	0		Custom note...	477.19	
Adjustment:		Amount...			Type: ▼		
Client, Connie CDS MO #7	11/21/2016	\$573.43	0		Custom note...	573.43	

- d. On any row you can do the following.

1 Client, Connie CDS MO #5

2 11/7/2016

3 \$477.19

4 0

5 Adjustment:

6 Amount...

7 Type: ▼

1. Click to see the original invoice.
2. Enter a payment.
3. Put in a note (e.g., what is the plan for payment).
4. Add an attachment (such as a collection letter).
5. Enter an adjustment.
6. Choose the adjustment type from authorized list (configurable based on employee role).

Payroll

Again, since Billing and Payroll go hand in hand. The Payroll process will be very similar to the Billing process described above.

To calculate payroll:

1. Go on the main menu, choose **Billing** and choose **Calculate Billing and Payroll**.
2. Enter the date range. (Optionally you can do one client in payroll, which can be useful if you need to “redo” a check or pickup a stray timecard.)
3. Then select calculate.

NOTE You may want to extend your “**Starting Date**” further into the past to pick up visits that weren’t closed in time for the last payroll run.

4. You will see the visits that will be in the payroll export.
5. If you see obvious issues such as \$0 pay because caregiver doesn’t have a pay table) you can go fix the problem and then come back here and rerun before exporting.

Set Pay Rates for Employees

There are three steps to ensure accuracy in set up of employee pay rates.

Step 1: Set up Pay Codes

1. Go to Organizational Detail -> Billing Configuration -> Pay Codes.
2. Select “Add New Pay Code”.
3. Enter the name (like Pay10.50).
4. Set Units to 1.
5. Set type as “Pay per Time”.
6. Set time to one hour.
7. Enter the amount.

8. Select Save.
9. Note: You can use the same pay code for many employees.

Step 2: Assign Pay Rate to Caregiver

1. Select the Caregiver (caregivers tab).
2. Go to the “Pay Code” drop down.
3. Select the Pay Code for the employee (if not their go back to step 1).
4. Select Save (lower left).
5. If things look ok, go to the bottom and select “create invoice” or “create payment.”

NOTE The “view after creation” option will take you to the billing or payroll report screen.

The “recalculate” button will recalculate (e.g., pick up changed bill/pay rates).

Step 3 – View Billing Report (Client) or Payroll Report (Caregiver)

Here you can see, print and adjust your invoices and pay statements (with the adjust link on the right)

Add Adjustments

To add an adjustment for bills or payroll, follow these steps:

1. Go into “Adjustments” (left menu under billing).
2. Select "Add New Adjustment".

[For Billing:](#) If you need to charge more click charge, if you charged too much, click discount.

[For Payroll:](#) If you need to pay them more more click "charge", if you paid too much, click "discount".

3. For Billing: Click "Client".
4. For Payroll: Click “Caregiver”.
5. Select the client or caregiver name.
6. Set the date to the date the issue occurred on (can be future).
7. Type a short description.
8. Put in the dollar amount to be adjusted as a positive number.

Splitting Up a Payroll into Two

Here are the steps to create splitting up a payroll into two:

E.g., if you have an attendant with two clients and you want separate payroll reports.

1. Run payroll - this will make a single pay statement for the caregiver.
2. Go into Left Menu -> Billing -> Payroll Report (caregiver).
3. Find the payroll statement that you want to split and on the right-hand side of that pay statement line, press adjust.
4. Uncheck the visits that you want to leave off of the payroll and press save.
5. This will make the first pay statement and free up the excluded visits to go into a different payroll statement. So now you can calculate payroll again and you'll get a pay statement for the second client.

Reporting

Overview

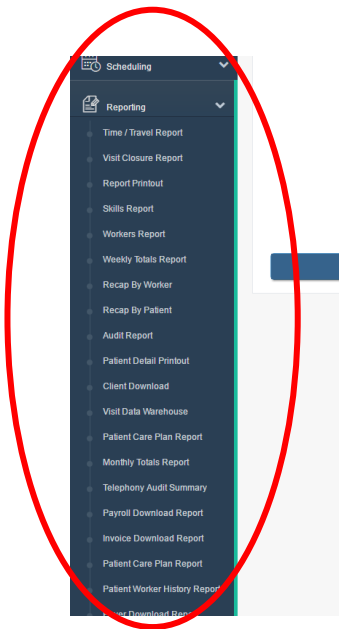
Ankota includes a variety of printable reports. Many customers also have custom reports they have had Ankota create for them. This document will examine the standard reports included in the base Ankota homecare system.

The Basics

Finding Reports - Most of the standard reports can be found under the **Reporting** menu option on the Main Menu.

The screenshot shows the Ankota dashboard interface. On the left is a dark sidebar with a menu. The 'Reporting' option, represented by a document icon, is circled in red. The main content area is titled 'Dashboard' and contains several summary cards: 'Census' (Active: 37, Pending: 0), 'Phone Calls' (Completed: 0, Pending: 0, Failed: 0), 'Open Alerts' (0), 'Visits' (Scheduled: 7), 'Open Visits' (Today: 0, Thursday: 0, Friday: 0), and 'Open Referrals' (Clients: 22, Caregivers: 0). At the bottom of the dashboard are three buttons: 'Clients', 'Transition Calls', and 'Alerts'. The footer includes 'Build 2.0.3752.1 | US Patent Pending' and '©Ankota LLC. All rights reserved Ankota LL'.

Click on the Reporting menu option to see the list of reports.



Note that the reports are shown in a list format. Ankota is creating categories for reports and will be putting reports into the following categories:

- Member/Patient
- Case Manager/Caregiver
- Services
- Billing
- Payroll

Each report will be sorted into the applicable category to make the reports easier to locate.

Additional reports will be created and added within the various categories.

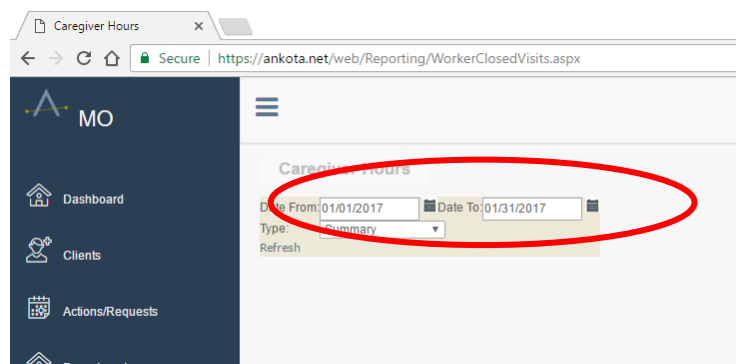
Occasionally, reports will be located in their respective main menu items. Two examples of this are:

- Billing Report – This report is located under the **Billing** main menu option.
- Worker Schedule Printout – Located under the **Scheduling** main menu option.

Running Reports

To run a report, simply click on the report name from the list that appears in the drop down box.

Each report has its own set of filters. Filters allow reports to serve multiple functions so that a single report can replace many different reports by simply selecting different filters. For example, a **Worker Hours** report can serve as a “flash” report of month to date hours, or a quarterly report or even an annual report, all by simply choosing different starting and ending dates for the report.



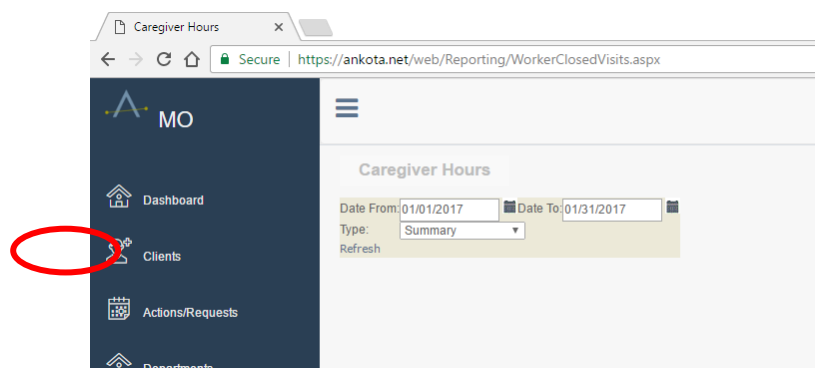
Similarly, this same **Worker Hours** report can be produced in Summary, Summary with Short Detail, Detail (full), or produced as a Quickbooks Hours report.

So in total, this *one* **Worker Hours** report can serve as four differently laid out reports, each of which can be produced for any desired date range, Meaning one report can serve the purposes of 20 different reports!

Report: Worker Hours Type Selection:	Period: Flash	Period: Monthly	Period: Quarterly	Period: Annually	Period: Any Period
Summary	X	X	X	X	X
Summary with Short Detail	X	X	X	X	X
Detail	X	X	X	X	X
QuickBooks Export	X	X	X	X	X

Thus, with only two filter variables, Date Range and Type, Ankota is able to deliver the same results as 20 different reports on most other systems. For that reason, Ankota requires fewer individual reports than most other system.

Once the filters have been entered or selected, to run the report, click on the **Refresh** button.



The report will appear as shown below.

Reports can be printed to a printer. However, to add further additional functionality and capability, most reports can also be saved in common working file formats as follows:

- Excel: The report will be opened as an editable Excel file.
- PDF: The report will appear as an Adobe .PDF file.
- Word: The report will appear as an editable Word file.

MO mylogo

Caregiver Hours

Date From: 01/01/2017 Date To: 01/31/2017

Type: Summary

Refresh

14 1 of 1 > >> Find |

WorkerID	Worker Name	Regular Hours	Regular Pay Per Hour	Total Regular Pay	Overtime Pay Per Hour	Total Overtime Pay	Other Adjustments	Total	Units (HoursX4)
122	Adams, Amy	13.5	10	135	0	0	0	135	54
120	Aniston, Jennifer	17.5	11	192.5	0	0	0	192.5	70
120	Aniston, Jennifer	7.5	7.5	56.25	0	0	0	56.25	30
128	Berry, Halle	9.07	8.75	79.33	0	0	0	79.33	36.28
131	Bullock, Sandra	0.42	8.5	3.54	0	0	0	3.54	1.68
129	Clooney, George	17.5	8.25	144.4	0	0	0	144.4	70
129	Clooney, George	7.5	7.5	56.25	0	0	0	56.25	30
118	Depp, Johnny	22.5	9	202.5	0	0	0	202.5	81
121	Field, Sally	16.25	9	146.25	0	0	0	146.25	58.5
132	Fox, Megan	16.25	8.5	138.15	0	0	0	138.15	54.86
133	Lively, Blake	2	18	36	0	0	0	36	14.4

The disc icon on the report header is the drop down list of options for saving the report

Below is the current listing of standard reports available in Ankota with a brief description of each report. Your specific reports may vary from this list if you have had Ankota create custom reports for your agency.

Reports List

Report Name	Filters	Sorting & Data Included
Time/Travel Report	<ul style="list-style-type: none"> – Date Range – Caregiver 	<p>Sorted by Date and Caregiver.</p> <p>Includes: Date of Visit, Visit time, Travel Time, Admin Time, Work Time, Total Time, Arrival Time, Departure Time, Mileage, Errand Miles, Patient (Member), Worker, Status.</p>
Visit Closure Report	<ul style="list-style-type: none"> – Client – Caregiver – Visit Status – Date Range 	<p>Sorted by Date and Time.</p> <p>Includes: Caregiver, Client Name, Care Plan, Visit Type, Arrival Date/Time, Departure Date/Time, Visit Status.</p>
Report Printout (Visit Report)	<ul style="list-style-type: none"> – Appointment Start Date – Appointment End Date – Worker – Service Name – Client Name 	<p>Sorted by Date.</p> <p>Includes: Service Name, Patient Name, Member Name, Appointment Date, Status.</p>
Skills Report		<p>Sorted by Worker.</p> <p>Includes: Name, ID, Member ID, Status, Department, (List of skills as set by the agency).</p>
Workers Report	<ul style="list-style-type: none"> – Caregiver Last Name 	<p>Sorted by Worker Last Name.</p> <p>Includes: First Name, Last Name, Street, City, State, Postal Code, Primary Phone, Secondary Phone, Email Address, Birth Date, Hiring Date, ID, Ankota ID, Department, Pay Table, Status.</p>
Weekly Totals Report	<ul style="list-style-type: none"> – Date 	<p>Sorted by Department.</p> <p>Includes: This Week, Last Week, 2 Weeks Ago, 3 Weeks Ago, 4 Weeks Ago, 5 Weeks Ago, 6 Weeks Ago, 7 Weeks Ago, 8 Weeks Ago, 9 Weeks Ago, 10 Weeks Ago, 11 Weeks Ago, 12 Weeks ago.</p>
Recap By Worker	<ul style="list-style-type: none"> – Date 	<p>Sorted by Date.</p> <p>Includes: Caregiver Name, Sun, Mon, Tue, Wed, Thu, Fri, Sat, Total, Last Week, Week Before, Department.</p>
Recap By Patient (Member)	<ul style="list-style-type: none"> – Date 	<p>Sorted by Date.</p> <p>Includes: Caregiver Name, Sun, Mon, Tue, Wed, Thu, Fri, Sat, Total, Last Week, Week Before, Department.</p>

Report Name	Filters	Sorting & Data Included
Audit Report	<ul style="list-style-type: none"> – Date Range – Client Last Name – Client First Name – Caregiver Last Name – Caregiver First Name 	<p>Sorted by Day of week.</p> <p>Day of the week, Date, Expected Time In, Expected Time Out, Telephony Time In, Telephony Time Out, Overridden Time In, Overridden Time Out, Billed Visit Hours, Scheduled Hours, Telephony Hours, Travel Mileage, Employee Name, Employee ID, Client Name, Client ID, Department, Expected Client Phone Number, Actual Phone Number In, Actual Phone Number Out, Violation Phone In, Violation Phone Out, Visit Type, Approval Reason, Approval Notes, Approved By, Visit ID, Violation Time In, Violation Time Out, Expected Duration, Actual Duration, Violation Duration, Violation GPS Arrival, Violation GPS Departure, Violation, Holiday Hours, Visit Notes.</p>
Patient Detail Printout	<ul style="list-style-type: none"> – Date Range – Include former and deceased clients – Include visit notes – Include visit details – Client Name – Care Plan 	<p>Sorted by Employee</p> <p>Includes: Arrival Date, Departure Date, Duration in Hrs/Min, Program Type, Visit Reason, Tasks (enumerated), Arrival Telephone Number, Departure Telephone Number, Employee First Name, Employee Last Name, Employee Discipline, Employee ID.</p>
Client Download	<ul style="list-style-type: none"> – Last name – Referring Program 	<p>Sorted by Client Last Name.</p> <p>Includes: First Name, Last Name, Street, City, State Code, Postal Code, Primary Phone, Secondary Phone, ID, Ankota ID, Bill Code, Bill Code 24, Pay Code, Pay Code 24, Department, Birth Date, Status, Skills.</p>
Visit Data Warehouse	<ul style="list-style-type: none"> – Date From – Date To – Plan Type 	<p>Sorted by Worker Last Name.</p> <p>Includes: Visit Date, Patient Name, Agency Name, Worker Name, Dentist Name, Scheduled Start, Scheduled End, Actual Start, Actual End, Bill Rate, Upcharge, Bill Amount, Pay Rate, Bonus, Pay Amount, Visit Status, Visit Number, Service Type, CRM Status, Effective Date, Plan Name, CRM Status DOS, Effective Date DOS, Plan DOS, Department, Birth Date, Status, Skills.</p>
Monthly Totals Report	<ul style="list-style-type: none"> – Date 	<p>Sorted by Department.</p> <p>Includes: Department, This Month, Last Month, Two Months Ago, Three Months Ago, Four Months Ago, Five Months Ago, Six Months Ago, Seven Months Ago, Eight Months Ago, Nine months Ago, Ten Months Ago, Eleven Months Ago, Twelve Months Ago.</p>

Report Name	Filters	Sorting & Data Included
Telephony Audit Summary	<ul style="list-style-type: none"> – Date Range – Worker 	<p>Sorted by Employee Name.</p> <p>Includes: Employee Name, Time In Violation, Time Out Violation, Duration Violation, Phone In Violation, Phone Out Violation, FVV In Violation, FVV Out Violation, Voice Sign In violation, Voice Sign Out Violation, GPS Arrival Violation, GPS Departure Violation, Visits With Violations, Total Visits, Percent Compliance.</p>
Payroll Download Report	<ul style="list-style-type: none"> – Date Range – Referring Program – Patient – Visit Date 	<p>Sorted by Employee Name.</p> <p>Includes: Employee Name, Client Name, Payer Name, Visit Type, Date, Start Time, End Time, Total Hours, Rate, Total, Mileage, Travel Time.</p>
Invoice Download Report	<ul style="list-style-type: none"> – Date Range – Referring Program – Patient – Visit Date/Invoice Date 	<p>Sorted by Client Name.</p> <p>Includes: Client Name, Worker Name, Payer Name, Visit Type, Date, Start Time, End Time, Total Hours, Rate, Total Charge, Mileage.</p>
Patient Care Plan Report	<ul style="list-style-type: none"> – Date – Last Name 	<p>Sorted by Patient Name.</p> <p>Includes: Patient ID, Ankota Plan Name, Plan Type, Active From, Active To.</p>
Patient Worker History Report	<ul style="list-style-type: none"> – First Name – Last Name 	<p>Sorted by Patient Name.</p> <p>Includes: Worker Name, Cell Phone, Patient Name, Last Date.</p>
Payer Download Report	<ul style="list-style-type: none"> – Patient Last Name 	<p>Sorted by Client Last Name.</p> <p>Includes: Client First Name, Client Last Name, Payer First Name, Payer Lat Name, Address 1, City, State Code, Postal Code, Primary Phone Secondary Phone, Payer ID.</p>

Report Name	Filters	Sorting & Data Included
Worker Hours Report	<ul style="list-style-type: none"> – Date Range – Type: <ul style="list-style-type: none"> ○ Summary ○ Summary Short ○ Detail ○ QuickBooks Export 	<p>Sorted by Client Last Name.</p> <p>SUMMARY Includes: Worker ID, Worker Name, Regular Hours, Regular Pay Per Hour, Total Regular Pay, Overtime Hours, Overtime Pay Per Hour, Total Overtime Pay, Other, Adjustments, Total, Units (Hours x 4).</p> <p>SUMMARY SHORT Includes: Worker Name, Worker Department, Regular Hours, Regular Pay Per Hour, Overtime Hours, Overtime Pay Per Hour, Adjustments.</p> <p>DETAIL Includes: Worker ID, Worker Name, Date, Patient Name, Duration, Rate, Amount, Type.</p> <p>QUICKBOOKS EXPORT Includes: Worker Name, Regular Hours, Regular Pay Per Hour, Total Regular Pay, Overtime Hours, Overtime Pay Per Hour, Total Overtime Pay, Other, Adjustments, Total, Units (Hours x 4).</p>
Authorize Service Warnings Report	<ul style="list-style-type: none"> – Month – Warning Type – Visit Type – Patient – Threshold (%) 	<p>Sorted by Patient Last Name.</p> <p>Includes: Patient Name, Start-End Dates, Visit Type, Period, Authorized Hours/Units, Prediction %, Remaining Units, Remaining Visits, Recommendations, Period Warnings, Monthly Warnings, Seek 1, Week 2, Week 3, Week 4, Week 5.</p>
Quarterly Unit Usage Report	<ul style="list-style-type: none"> – Year – Quarter 	<p>Sorted by Visit Type Category.</p> <p>Includes: Agency, Visit Type Category, Total Paid Claims, Number of Patients, Total Units Authorized, Total Units Delivered, Agency Total.</p>
Invoice Summary Report	<ul style="list-style-type: none"> – Month – Referring program – Patient 	<p>Sorted by Date.</p> <p>Includes: Date, Agency, Name, Invoice Total, Amount, Type, Chank Number, Account Number, Notes, Total Paid.</p>

Time/Travel Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Caregiver 	<p>Sorted by Date and Caregiver.</p> <p>Includes: Date of Visit, Visit time, Travel Time, Admin Time, Work Time, Total Time, Arrival Time, Departure Time, Mileage, Errand Miles, Patient (Member), Worker, Status.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report

Support Ankota

Time Travel Detail Report

Date From: 01/01/2017
Date To: 02/08/2017
Caregiver: -- All --

Refresh
1 of 2
Find | Next

	Visit Time	Travel Time	Admin Time	Work Time	Total Time	Arrived Date	Mileage	Errand Miles	Patient	Worker	Visit Status
Sunday, 01/01	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Monday, 01/02	0:-11	0:0	0:0	0:0	0:-11	11:26 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	On Hold
Tuesday, 01/03	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Wednesday, 01/04	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Thursday, 01/05	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Friday, 01/06	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Saturday, 01/07	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Sunday, 01/08	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled
Monday, 01/09	3:15	0:0	0:0	0:0	3:15	8:00 AM to 11:15 AM	0	0	Consumer, Test	Adams, Amy	Scheduled

Visit Closure Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> Client Caregiver Visit Status Date Range 	<p>Sorted by Date and Time.</p> <p>Includes: Caregiver, Client Name, Care Plan, Visit Type, Arrival Date/Time, Departure Date/Time, Visit Status.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report

mylogo

Visit Closure Report

Client: - All - Caregiver: - All - Visit Status: All Visits View Report

Date From: 02/01/2017 Date To: 02/08/2017

Caregiver	Client Name	Care Plan	Visit Type	Arrival Date/Time	Departure Date/Time	Visit Status	
Adams, Amy	Consumer, Test	Test Consumer	Personal Care CDS	02/02/2017 08:00 AM	02/02/2017 11:15 AM	Passed Screening	
Field, Sally	Stock, Arthur	Arthur	Personal Care CDS	02/02/2017 08:00 AM	02/02/2017 11:15 AM	Passed Screening	
Bullock, Sandra	Rose, Axel	Axel Rose CDS	Personal Care CDS	02/02/2017 08:00 AM	02/02/2017 08:45 AM	Passed Screening	
Fox, Megan	Ford, Harlison	Harrison	Personal Care CDS	02/02/2017 10:00 AM	02/02/2017 01:15 PM	Passed Screening	
Depp, Johnny	Mongiardo, Judy	Judy	Personal Care CDS	02/02/2017 10:30 AM	02/02/2017 01:45 PM	Passed Screening	
Berry, Halle	McPherson, Coleen	Coleen	Personal Care CDS	02/02/2017 12:30 PM	02/02/2017 04:30 PM	Passed Screening	

0

Visit Report Printout

Filters	Sorting & Data Included
<ul style="list-style-type: none"> Appointment Start Date Appointment End Date Worker Service Name Client Name 	<p>Sorted by Date.</p> <p>Includes: Service Name, Patient Name, Member Name, Appointment Date, Status.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report
 - Weekly Totals Report

mylogo Support Ankota

Visit Report Printout

Note: Query return maximum 500 records per search.

Appointment Start Date: 02/01/2017
Worker: All Caregivers
Client Name: All Clients

Appointment End Date: 02/08/2017
Service Name: All Service Types
Search


	Service Name	Patient Name	Member Name	Appointment Date	
<input type="checkbox"/>	Personal Care CDS	Test Consumer	Amy Adams	2/2/2017	Create Report
<input type="checkbox"/>	Personal Care CDS	Arthur Stock	Sally Field	2/2/2017	Create Report
<input type="checkbox"/>	Personal Care CDS	Axel Rose	Sandra Bullock	2/2/2017	Create Report
<input type="checkbox"/>	Personal Care CDS	Harilson Ford	Megan Fox	2/2/2017	Create Report
<input type="checkbox"/>	Personal Care CDS	Judy Mongiardo	Johnny Depp	2/2/2017	Create Report
<input type="checkbox"/>	Personal Care CDS	Coleen McPherson	Halle Berry	2/2/2017	Create Report

Create Reports
Save All As PDF


0

Skills Report

Filters	Sorting & Data Included
– None	Sorted by Worker Last Name. Includes: Name, ID, Member ID, Status, Department, (List of skills as set by the agency).



- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report


Support Ankota

Skills Report

Refresh
1 of 1
Find | Next

Name	ID	MemberID	Status	Department	1XL	2XL	3XL	4XL	Aide	Auto Insurance Quarterly	Background Check Level 2	Cats	CDS
Adams, Amy	122	14867	Active	MO									
Aniston, Jennifer	120	14865	Active	MO									
Ankota, Support		14985	Active	PYR Kennett									
Ankota, Support		14987	Active	PYR Jefferson City									
Ankota, Support		14989	Active	PYR Kirksville									
Ankota, Support		14853	Active	MO									
Berry, Halle	128	14873	Active	MO									

Workers Report (Caregivers Download Report)

Filters	Sorting & Data Included
— Caregiver Last Name	Sorted by Worker Last Name. Includes: First Name, Last Name, Street, City, State, Postal Code, Primary Phone. Secondary Phone, Email Address, Birth Date, Hiring Date, ID, Ankota ID, Department, Pay Table, Status.

Support/Ankota

MO

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report
 - Weekly Totals Report

Caregivers Download Report

Caregiver Last Name:

Refresh


1 of 2

Find | Next

City	State Code	Postal Code	Primary Phone	Secondary Phone	Email Address	Birth Date	Hiring Date	Id	AnkotaId	Department	PayTable	Status
e St,	Kansas City	MO	64124	816-572-8906		10/15/1959		122	14867 MO			Active
ury,	Kansas City	MO	64127	816-206-4187		11/14/1974		120	14865 MO			Active
									14853 MO			Active
									14985 PYR Kennett			Active
									14987 PYR Jefferson City			Active
									14989 PYR Kirksville			Active
99th St.,	Kansas City	MO	64131	816-756-8407		09/09/1979		128	14873 MO			Active
ton	Kansas City	MO	64128	816-352-9335		10/20/1964		131	14876 MO			Active

Weekly Totals Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> Date 	<p>Sorted by Department.</p> <p>This Week, Last Week, 2 Weeks Ago, 3 Weeks Ago, 4 Weeks Ago, 5 Weeks Ago, 6 Weeks Ago, 7 Weeks Ago, 8 Weeks Ago, 9 Weeks Ago, 10 Weeks Ago, 11 Weeks Ago, 12 Weeks ago.</p>


Support Ankota

MO

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report

Weekly Totals Report

Date: 02/08/2017

Refresh

1 of 1

Find | Next

Department	ThisWeek	LastWeek	TwoWeeksAgo	ThreeWeeksAgo	FourWeeksAgo	FiveWeeksAgo	SixWeeksAgo	SevenWeeksAgo	EightWeeksAgo	NineWeeksAgo	TenWeeksAgo
MO	0	18	3	80	46	1	0	0	3	4	
Total	0	18	3	80	46	1	0	0	3	4	

Recap By Worker

Filters	Sorting & Data Included
– Date	Sorted by Date. Caregiver Name, Sun, Mon, Tue, Wed, Thu, Fri, Sat, Total, Last Week, Week Before, Department.

Dashboard

Clients

Actions/Requests

Departments

Refer Client

Visits

Caregivers

Scheduling

Reporting

Time / Travel Report

Visit Closure Report

Report Printout

Skills Report

Workers Report

Weekly Totals Report

Recap By Worker

Recap By Patient

Audit Report

Date: 02/08/2017

Refresh

1 of 1

Find | Next

Caregiver Name	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Last Week	Week Before	Department
Adams, Amy	0	0	0	0	0	0	0	0	3	0 MO	
Berry, Halle	0	0	0	0	0	0	0	0	4	0 MO	
Bullock, Sandra	0	0	0	0	0	0	0	0	1	0.5 MO	
Depp, Johnny	0	0	0	0	0	0	0	0	3	2.5 MO	
Field, Sally	0	0	0	0	0	0	0	0	3	0 MO	
Fox, Megan	0	0	0	0	0	0	0	0	3	0 MO	
Totals	0	0	0	0	0	0	0	0	17	3	

Recap By Patient (Member)

Filters	Sorting & Data Included
– Date	Sorted by Date. Caregiver Name, Sun, Mon, Tue, Wed, Thu, Fri, Sat, Total, Last Week, Week Before, Department.

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report

Support Ankota

Recap By Client Report

Date: 02/08/2017
Refresh

1 of 1
Find | Next

Client Name	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Last Week	Week Before	Department
Accardi, Amy	0	0	0	2	0	0	0	2	0	0	MO
Consumer, Test	0	0	0	0	0	0	0	0	3	0	MO
Ford, Harlison	0	0	0	0	0	0	0	0	3	0	MO
McPherson, Coleen	0	0	0	0	0	0	0	0	4	0	MO
Mongiardo, Judy	0	0	0	0	0	0	0	0	3	2.5	MO
Rose, Axel	0	0	0	0	0	0	0	0	1	0	MO
Stock, Arthur	0	0	0	0	0	0	0	0	3	0	MO
Totals	0	0	0	2	0	0	0	2	17	2.5	

Audit Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Client Last Name – Client First Name – Caregiver Last Name – Caregiver First Name 	<p>Sorted by Day of week.</p> <p>Day of the week, Date, Expected Time In, Expected Time Out, Telephony Time In, Telephony Time Out, Overridden Time In, Overridden Time Out, Billed Visit Hours, Scheduled Hours, Telephony Hours, Travel Mileage, Employee Name, Employee ID, Client Name, Client ID, Department, Expected Client Phone Number, Actual Phone Number In, Actual Phone Number Out, Violation Phone In, Violation Phone Out, Visit Type, Approval Reason, Approval Notes, Approved By, Visit ID, Violation Time In, Violation Time Out, Expected Duration, Actual Duration, Violation Duration, Violation GPS Arrival, Violation GPS Departure, Violation, Holiday Hours, Visit Notes.</p>

The screenshot shows a web application interface for an Audit Report. On the left is a dark sidebar with navigation icons and labels: Dashboard, Clients, Actions/Requests, Departments, Refer Client, Visits, Caregivers, Scheduling, Reporting (expanded), and Audit Report. The main area contains a form for filtering by date range (02/01/2017 to 02/08/2017) and client/caregiver names. Below the form is a table with 15 columns: Day of the week, Date, Expected Time In, Expected Time Out, Telephony Time In, Telephony Time Out, Overridden Time In, Overridden Time Out, Billed Visit Hours, Scheduled Hours, Telephony Hours, Travel Mileage, Employee Name, Employee ID, and Employee. The table lists several visits for the dates 02/08/2017 and 02/02/2017, including details like time in/out, hours, and employee information. A 'Total' row at the bottom summarizes the data.

Day of the week	Date	Expected Time In	Expected Time Out	Telephony Time In	Telephony Time Out	Overridden Time In	Overridden Time Out	Billed Visit Hours	Scheduled Hours	Telephony Hours	Travel Mileage	Employee Name	Employee ID
Wednesday	02/08/2017	08:00	10:00	14:24	14:36	12:24	14:36	2.0	2.0	2.20	0	Kidman, Nicole	130
Thursday	02/02/2017	08:00	11:15			08:00	11:15	3.3	3.3	3.25	0	Adams, Amy	122
Thursday	02/02/2017	10:00	13:15			10:00	13:15	3.3	3.3	3.25	0	Fox, Megan	132
Thursday	02/02/2017	12:30	16:30			12:30	16:30	4.0	4.0	4.00	0	Berry, Halle	128
Thursday	02/02/2017	10:30	13:45			10:30	13:45	3.3	3.3	3.25	0	Depp, Johnny	118
Thursday	02/02/2017	08:00	08:45			08:00	08:45	0.8	0.8	0.75	0	Bullock, Sandra	131
Thursday	02/02/2017	08:00	11:15			08:00	11:15	3.3	3.3	3.25	0	Field, Sally	121
Total:								20.0	20.0	19.95			

Most customers use this report as an export to Excel where they determine which columns to retain and which to discard.

Patient Detail Printout

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Include former and deceased clients – Include visit notes – Include visit details – Client Name – Care Plan 	<p>Sorted by Employee</p> <p>Includes: Arrival Date, Departure Date, Duration in Hrs/Min, Program Type, Visit Reason, Tasks (enumerated), Arrival Telephone Number, Departure Telephone Number, Employee First Name, Employee Last Name, Employee Discipline, Employee ID.</p>

Dashboard

Clients

Actions/Requests

Departments

Refer Client

Visits

Caregivers

Scheduling

Reporting

Time / Travel Report

Visit Closure Report

Report Printout

Skills Report

Workers Report

Weekly Totals Report

Recap By Worker

Recap By Patient

Patient Detail Printout

Note: Query return maximum 500 records per search.

Start Date

02/01/2017

End Date

02/08/2017

☐ Include former holding, and deceased clients
 ☐ Include visit notes
 ☒ Include visit details

Client Name:

Accardi, Amy

Adams, Marge

Cezanne, Paul

Chagal, Marc

Client, Connie

Care Plan:

Amy

Search

14

1

of 1

Find | Next

MO

Client Detail Report by Employee

2/8/2017 - 2/8/2017

Accardi, Amy (426063)

Wednesday

ARRIVE DATE

Feb 8 2017

12:24PM

DEPART DATE

Feb 8 2017

2:36PM

DURATION IN HRS/MIN

120

PROG TYPE

MO

VISIT REASON

Personal Care

CDS

Change Linens

Complete

Clean Bath

Not Needed Today

Dressing and Grooming

Complete

Laundry

Complete

Personal Care

Complete

ARRIVE TELEPHONE NO.

617-320-8502

DEPART TELEPHONE NO.

617-320-8502

Client Download

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Last name – Referring Program 	<p>Sorted by Client Last Name.</p> <p>Includes: First Name, Last Name, Street, City, State Code, Postal Code, Primary Phone, Secondary Phone, ID, Ankota ID, Bill Code, Bill Code 24, Pay Code, Pay Code 24, Department, Birth Date, Status, Skills.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report

Support Ankota

Client Download

Last Name: Referring Program: -- All --

Refresh

1 of 1

Find | Next

First Name	Last Name	Street	City	State Code	Postal Code	Primary Phone	Secondary Phone	Id	Ankota Id	Bill Code	Bill Code 24	Pay Code	Pay Code 24
Amy	Accardi	4101 Main St.	Kansas City	MO	64111	111-222-3333		DCN122345	426063				
Marge	Adams	4013 E 31st street.	Kansas City	MO	64128	777-666-5555		MEDICAID-ID123	421437				
Paul	Cezanne	1733 Kansas Ave.,	Kansas City	MO	64127	816-489-2469		7480320	416115				
Marc	Chagal	612 NE Howard Ave., Apt. 125	Lee Summit	MO	64063	816-522-7598	816-600-5359	17460825	416117				
Connie	Client	1733 Kansas Ave.,	Kansas City	MO	64127	555-121-2100		1234	423254				
Connie	Client	1733 Kansas Ave.,	Kansas City	MO	64127	617-320-8502		1234567	416182				
Test	Consumer	4012 South Lynn Drive, Unit B	Independence	MO	64055	111-222-3333		Medicaid123	417053				
Salvador	Dali	2912 Askew Ave.,	Kansas City	MO	64128	816-812-9731	816-756-6878	22210702	416106				
Jane	DaVinci	4310 Canterbury Pl., Apt. 2	Independence	MO	64055	816-373-2702		62538552	416113				
Edgar	Degas	2855 Harvard Ave.,	Independence	MO	64052	816-313-5766		13106796	416116				
Marcel	DuChamp	1008 SE Gingerbread Ln.,	Blue Springs	MO	64014	816-427-5180		34364076	416122				
Mabel	Edwards	2607 Drury,	Kansas City	MO	64127	445-555-6666		MEDICAIDID123	420156				
Tina	Fey	4312 Kensington	Kansas City	MO	64130	816-923-5224		20336675	416125				

Visit Data Warehouse

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date From – Date To – Plan Type 	<p>Sorted by Worker Last Name.</p> <p>Includes: Visit Date, Patient Name, Agency Name, Worker Name, Dentist Name, Scheduled Start, Scheduled End, Actual Start, Actual End, Bill Rate, Upcharge, Bill Amount, Pay Rate, Bonus, Pay Amount, Visit Status, Visit Number, Service Type, CRM Status, Effective Date, Plan Name, CRM Status DOS, Effective Date DOS, Plan DOS, Department, Birth Date, Status, Skills.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report
 - Weekly Totals Report

Support Ankota

Visit Data Warehouse

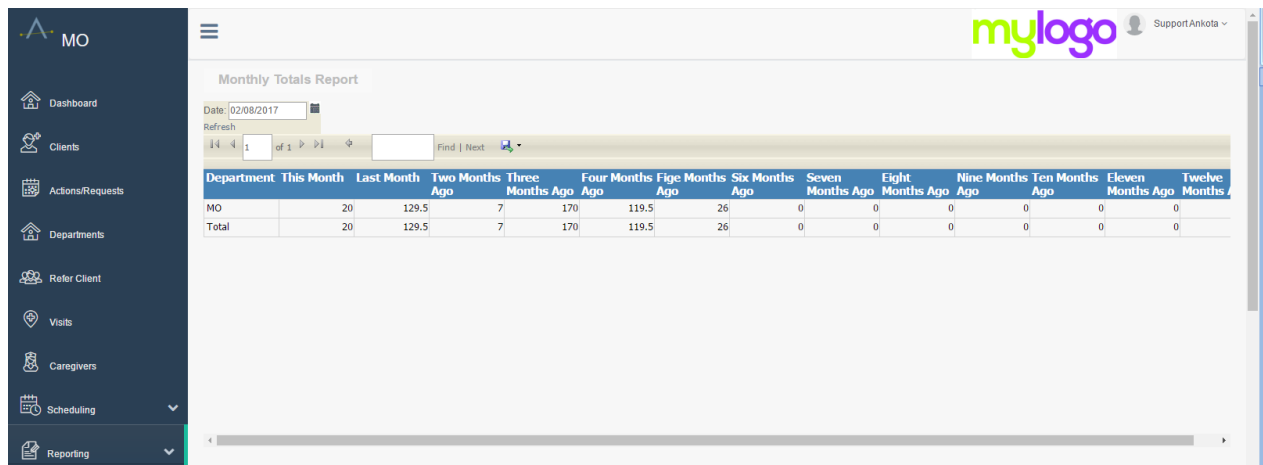
Date From: 01/01/2017
Date To: 02/08/2017
Plan Type: All
Refresh

1 of 2

Visit Date	Patient Name	Agency Name	Worker Name	Dentist Name	Scheduled Start	Scheduled End	Actual Start	Actual End	Bill Rate	Upcharge	Bill Amount	Pay Rate	Bonus
01/15/17	Chagal, Marc	IHS MO	Aniston, Jennifer		12:00PM	2:00PM	12:00PM	2:00PM	4.60	0.00	36.80	11.00	0.00
01/16/17	Chagal, Marc	IHS MO	Aniston, Jennifer		12:00PM	2:00PM	12:00PM	2:00PM	4.60	0.00	36.80	11.00	0.00
01/13/17	Chagal, Marc	IHS MO	Aniston, Jennifer		12:00PM	2:00PM	12:00PM	2:00PM	4.60	0.00	36.80	11.00	0.00
01/14/17	Chagal, Marc	IHS MO	Aniston, Jennifer		12:00PM	2:00PM	12:00PM	2:00PM	4.60	0.00	36.80	11.00	0.00
01/17/17	Chagal, Marc	IHS MO	Aniston, Jennifer		12:00PM	2:00PM	12:00PM	2:00PM	4.60	0.00	36.80	11.00	0.00
01/16/17	Chagal, Marc	IHS MO	Aniston, Jennifer		10:30AM	12:00PM	10:30AM	12:00PM	4.60	0.00	27.60	11.00	0.00
01/15/17	Chagal, Marc	IHS MO	Aniston, Jennifer		2:00PM	3:30PM	2:00PM	3:30PM	4.10	0.00	24.60	7.50	0.00
01/17/17	Chagal, Marc	IHS MO	Aniston, Jennifer		2:00PM	3:30PM	2:00PM	3:30PM	4.10	0.00	24.60	7.50	0.00

Monthly Totals Report

Filters	Sorting & Data Included
– Date	Sorted by Department. Includes: Department, This Month, Last Month, Two Months Ago, Three Months Ago, Four Months Ago, Five Months Ago, Six Months Ago, Seven Months Ago, Eight Months Ago, Nine months Ago, Ten Months Ago, Eleven Months Ago, Twelve Months Ago.



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Monthly Totals Report

Date: 02/08/2017

Refresh

1 of 1

Find | Next

Department	This Month	Last Month	Two Months Ago	Three Months Ago	Four Months Ago	Five Months Ago	Six Months Ago	Seven Months Ago	Eight Months Ago	Nine Months Ago	Ten Months Ago	Eleven Months Ago	Twelve Months Ago
MO	20	129.5	7	170	119.5	26	0	0	0	0	0	0	0
Total	20	129.5	7	170	119.5	26	0	0	0	0	0	0	0

Telephony Audit Summary

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Worker 	<p>Sorted by Employee Name.</p> <p>Includes: Employee Name, Time In Violation, Time Out Violation, Duration Violation, Phone In Violation, Phone Out Violation, FVV In Violation, FVV Out Violation, Voice Sign In violation, Voice Sign Out Violation, GPS Arrival Violation, GPS Departure Violation, Visits With Violations, Total Visits, Percent Compliance.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout

Support Ankota

Telephony Audit Summary

Date From: 12/01/2016
Date To: 01/31/2017
Worker: --Not Specified--


Refresh

1 of 1
Find | Next

Employee Name	Time In Viol	Time Out Viol	Duration Viol	Phone Viol In	Phone Viol Out	FVV In Viol	FVV Out Viol	Voice Sign In Viol	Voice Sign Out Viol	Gps Arrival Viol	Gps Departure Viol	Visits with Violations	Total
Adams, Amy	0	0	1	0	0	0	0	0	0	0	0	0	1
Aniston, Jennifer	0	0	0	0	0	0	0	0	0	0	0	0	0
Ankota, Support	0	0	0	0	0	0	0	0	0	0	0	0	0
Ankota, Support	0	0	0	0	0	0	0	0	0	0	0	0	0
Berry, Halle	0	0	1	1	1	0	0	0	0	0	0	0	1
Bullock, Sandra	0	0	1	1	0	0	0	0	0	0	0	0	1
Caregiver, Clarence	0	0	0	0	0	0	0	0	0	0	0	0	0
Clooney, George	0	0	0	0	0	0	0	0	0	0	0	0	0
Cole, David	0	0	0	0	0	0	0	0	0	0	0	0	0

Payroll Download Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Referring Program – Patient – Visit Date 	<p>Sorted by Employee Name.</p> <p>Includes: Employee Name, Client Name, Payer Name, Visit Type, Date, Start Time, End Time, Total Hours, Rate, Total, Mileage, Travel Time.</p>


Support Ankota

Payroll Download Report

Date From: 01/01/2017
Date To: 02/28/2017

Referring Program: -- All --
Visit Date: --

Patient: All Clients

Refresh

1 of 2
Find | Next

Worker Name	Client Name	Payer Name	Visit Type	Date	Start Time	End Time	Total Hours	Rate	Total	Mileage	Travel Time
Adams, Amy	Consumer, Test	CDS MO;	Personal Care CDS	01/13/2017	8:00AM	11:15AM	3.2500	10	32.50	0	0
Adams, Amy	Consumer, Test	CDS MO;	Personal Care CDS	01/14/2017	8:00AM	11:15AM	3.2500	10	32.50	0	0
Adams, Amy	Consumer, Test	CDS MO;	Personal Care CDS	01/16/2017	8:00AM	11:15AM	3.2500	10	32.50	0	0
Adams, Amy	Consumer, Test	CDS MO;	Personal Care CDS	01/17/2017	8:00AM	11:15AM	3.2500	10	32.50	0	0
Adams, Amy	Consumer, Test	CDS MO;	Personal Care CDS	01/15/2017	11:18PM	11:48PM	0.5000	10	5.00	0	0
Aniston, Jennifer	Chagal, Marc	IHS MO;	Respite Care	01/13/2017	2:00PM	3:30PM	1.5000	7.5	11.25	0	0
Aniston, Jennifer	Chagal, Marc	IHS MO;	Respite Care	01/14/2017	2:00PM	3:30PM	1.5000	7.5	11.25	0	0
Aniston, Jennifer	Chagal, Marc	IHS MO;	Respite Care	01/15/2017	2:00PM	3:30PM	1.5000	7.5	11.25	0	0

MO

Dashboard
Clients
Actions/Requests
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Refer Client
Visits
Caregivers
Scheduling
Reporting
Time / Travel Report
Visit Closure Report
Report Printout
Skills Report

Invoice Download Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Referring Program – Patient – Visit Date/Invoice Date 	<p>Sorted by Client Name.</p> <p>Includes: Client Name, Worker Name, Payer Name, Visit Type, Date, Start Time, End Time, Total Hours, Rate, Total Charge, Mileage.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report

Support: Ankota

Invoice Download Report

Date From: 01/01/2017
Date To: 02/28/2017

Referring Program: -- All --
Visit Date:

Patient: All Clients

Refresh

1 of 2

Find | Next

Client Name	Worker Name	Payer Name	Visit Type	Date	Start Time	End Time	Total Hours	Rate	Total Charge	Mileage
Adams, Marge	Lively, Blake	CDS MO; David Cole	Nursing	01/16/2017	8:00AM	9:00AM	1.0	44.35	44.35	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Respite Care	01/13/2017	2:00PM	3:30PM	1.5	4.1	24.60	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Respite Care	01/14/2017	2:00PM	3:30PM	1.5	4.1	24.60	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Respite Care	01/15/2017	2:00PM	3:30PM	1.5	4.1	24.60	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Respite Care	01/16/2017	2:00PM	3:30PM	1.5	4.1	24.60	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Respite Care	01/17/2017	2:00PM	3:30PM	1.5	4.1	24.60	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Personal Care In Home	01/13/2017	10:30AM	12:00PM	1.5	4.6	27.60	0
Chagal, Marc	Aniston, Jennifer	IHS MO;	Personal Care In Home	01/14/2017	10:30AM	12:00PM	1.5	4.6	27.60	0

Patient Care Plan Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date – Last Name 	<p>Sorted by Patient Name.</p> <p>Includes: Patient ID, Ankota Plan Name, Plan Type, Active From, Active To.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report
 - Weekly Jobs Report

Support Ankota

Patient Care Plan Report

Date: 02/08/2017
Last Name:
Refresh

1 of 1
Find | Next

Patient Name	Id	AnkotaId	Plan Name	Plan Type	Active From	Active To
Accardi, Amy	DCN122345	426063	Amy			
Adams, Marge	MEDICAID-ID123	421437	Marge Adams			
Cezanne, Paul	7480320	0	None	None		
Chagal, Marc	17460825	416117	Marc Chagal			
Client, Connie	1234567	416182	Connie Client			
Client, Connie	1234	423254	Connie Client			
Consumer, Test	Medicaid123	417053	Test Consumer			
Dali, Salvador	22210702	0	None	None		
DaVinci, Jane	62538552	0	None	None		
Degas, Edgar	13106796	0	None	None		
DuChamp, Marcel	34364076	0	None	None		
Fey, Tina	20336675	0	None	None		
Ford, Harlison	FMID123	422897	Harrison			
Gauguin, Paul	562216	0	None	None		
Harrington, Charlotte	MED12345	421324	Charlotte			
Kahlo, Frida	12705002	0	None	None		
Klimt, Gustav	12308583	0	None	None		
Manet, Eduard	10766387	0	None	None		
Matisse, Henri	24075807	0	None	None		
McPherson, Coleen	Coleen123	423740	Coleen			
Monet, Claude	21867075	0	None	None		

Patient Worker History Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> First Name Last Name 	<p>Sorted by Patient Name.</p> <p>Includes: Worker Name, Cell Phone, Patient Name, Last Date.</p>

Dashboard

Clients

Actions/Requests

Departments

Refer Client

Visits

Caregivers

Scheduling

Reporting

- Time / Travel Report
- Visit Closure Report
- Report Printout
- Skills Report
- Workers Report
- Weekly Totals Report
- Recap By Worker
- Recap By Patient

First Name:

Last Name:

Refresh


1 of 1

Find | Next

Worker Name	Cell Phone	Patient Name	Last Date
Halle Berry	816-756-8407	Polly Periwinkle	10/12/2016 8:00:00 AM
Sandra Bullock	816-352-9335	Patricia Wilson	10/12/2016 8:00:00 AM
Johnny Depp	816-984-9736	Mabel Edwards	11/14/2016 8:00:00 AM
Cameron Diaz	816-442-1584	Charlotte Harrington	11/21/2016 8:00:00 AM
Leonardo DiCaprio	816-585-9172	Marge Adams	11/23/2016 8:00:00 AM
Clarence Caregiver		Connie Client	11/29/2016 8:00:00 AM
Accumulated Minutes Worker		Connie Client	11/30/2016 1:00:00 AM
Accumulated Minutes Worker		Mabel Edwards	11/30/2016 1:00:00 AM
Blake Lively	816-519-5875	Connie Client	1/16/2017 8:00:00 AM
Blake Lively	816-519-5875	Marge Adams	1/16/2017 8:00:00 AM
George Clooney	816-547-3330	Leroy Nieman	1/17/2017 11:30:00 AM
Jennifer Aniston	816-206-4187	Marc Chagal	1/17/2017 2:00:00 PM
Amy Adams	816-572-	Test Consumer	2/2/2017 8:00:00 AM

Payer Download Report

Filters	Sorting & Data Included
– Patient Last Name	Sorted by Client Last Name. Includes: Client First Name, Client Last Name, Payer First Name, Payer Last Name, Address 1, City, State Code, Postal Code, Primary Phone, Secondary Phone, Payer ID.


Support Ankota

MO

- Dashboard
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- Visits
- Caregivers
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- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report
 - Weekly Totals Report

Payer Download Report

Refresh

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Find | Next

Client First Name	Client Last Name	Payer First Name	Payer Last Name	Address 1	City	State Code	Postal Code	Primary Phone	Secondary Phone	Payer ID
Amy	Accardi	Amy	Accardi	4101 Main St	Kansas City	MO	64111	111-222-3333		
Marge	Adams	Marge	Adams	4013 E 31st street	Kansas City	MO	64128	777-666-5555		
Paul	Cezanne	Paul	Cezanne	1733 Kansas Ave.	Kansas City	MO	64127	816-489-2469		
Marc	Chagal	Marc	Chagal	612 NE Howard Ave.	Lee Summit	MO	64063	816-522-7598	816-600-5359	
Connie	Client	Connie	Client	1733 Kansas Ave	Kansas City	MO	64127	555-121-2100		
Connie	Client	Connie	Client	1733 Kansas Ave	Kansas City	MO	64127	617-320-8502		
Test	Consumer	Test	Consumer	4012 South Lynn Drive	Independence	MO	64055	111-222-3333		
Salvador	Dali	Salvador	Dali	2912 Askew Ave.	Kansas City	MO	64128	816-812-9731	816-756-6878	
Jane	DaVinci	Jane	DaVinci	4310 Canterbury Pl.	Independence	MO	64055	816-373-2702		
Edgar	Degas	Edgar	Degas	2855 Harvard Ave.	Independence	MO	64052	816-313-5766		
Marcel	DuChamp	Marcel	DuChamp	1008 SE Gingerbread Ln.	Blue Springs	MO	64014	816-427-5180		
Tina	Fey	Tina	Fey	4312 Kensington Ave.	Kansas City	MO	64130	816-923-5224		
Harrison	Ford	Harrison	Ford	9595 N McGee St	Kansas City	MO	64155	777-666-5655		
Paul	Gauguin	Paul	Gauguin	1400 Topping Ave.	Kansas City	MO	64126	816-446-		

Worker Hours Report


Filters	Sorting & Data Included
<ul style="list-style-type: none"> – Date Range – Type: <ul style="list-style-type: none"> ○ Summary ○ Summary Short ○ Detail ○ QuickBooks Export 	<p>Sorted by Client Last Name.</p> <p>SUMMARY Includes: Worker ID, Worker Name, Regular Hours, Regular Pay Per Hour, Total Regular Pay, Overtime Hours, Overtime Pay Per Hour, Total Overtime Pay, Other, Adjustments, Total, Units (Hours x 4).</p> <p>SUMMARY SHORT Includes: Worker Name, Worker Department, Regular Hours, Regular Pay Per Hour, Overtime Hours, Overtime Pay Per Hour, Adjustments.</p> <p>DETAIL Includes: Worker ID, Worker Name, Date, Patient Name, Duration, Rate, Amount, Type.</p> <p>QUICKBOOKS EXPORT Includes: Worker Name, Regular Hours, Regular Pay Per Hour, Total Regular Pay, Overtime Hours, Overtime Pay Per Hour, Total Overtime Pay, Other, Adjustments, Total, Units (Hours x 4).</p>

(SUMMARY sample report shown below)

WorkerId	Worker Name	Regular Hours	Regular Pay Per Hour	Total Regular Pay	Overtime Hours	Overtime Pay Per Hour	Total Overtime Pay	Other Adjustments	Total	Units (HoursX4)
122	Adams, Amy	13.5	10	135	0	0	0	0	135	54
120	Aniston, Jennifer	17.5	11	192.5	0	0	0	0	192.5	70
120	Aniston, Jennifer	7.5	7.5	56.25	0	0	0	0	56.25	30
128	Berry, Halle	9.07	8.75	79.33	0	0	0	0	79.33	36.28
131	Bullock, Sandra	0.42	8.5	3.54	0	0	0	0	3.54	1.68
129	Clooney, George	17.5	8.25	144.4	0	0	0	0	144.4	70
129	Clooney, George	7.5	7.5	56.25	0	0	0	0	56.25	30
118	Depp, Johnny	22.5	9	202.5	0	0	0	0	202.5	90
121	Field, Sally	16.25	9	146.25	0	0	0	0	146.25	65
132	Fox, Megan	16.25	8.5	138.15	0	0	0	0	138.15	65
133	Lively, Blake	2	18	36	0	0	0	0	36	8

Authorize Service Warnings Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> Month Warning Type Visit Type Patient Threshold (%) 	<p>Sorted by Patient Last Name.</p> <p>Includes: Patient Name, Start-End Dates, Visit Type, Period, Authorized Hours/Units, Prediction %, Remaining Units, Remaining Visits, Recommendations, Period Warnings, Monthly Warnings, Seek 1, Week 2, Week 3, Week 4, Week 5.</p>



Support Ankota

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Dashboard

Clients

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Time / Travel Report

Visit Closure Report

Report Printout

Skills Report

Workers Report

Weekly Totals Report

Authorize Service Warnings

Month: Feb 2017

Warning Type: All Warnings

Visit Type: -- All --

Patient: -- All --

Threshold(%): 5

Refresh

Patient Name	Start-End	Visit type	Period	Authorized hours or units	Prediction	Remaining Units	Remaining Visits	Recommendation	Period Warnings	Monthly Warnings	week 1 01/30-02/05	week 2 02/06-02/12	week 3 02/13-02/19	week 4 02/20-02/26	week 5 02/27-03/05
Accardi, Amy	2/1/2017-9/30/2017	Personal Care CDS	Monthly	248.00u	67.74% - 168.00u	80.00u	20	Add 1 hours to 20 Personal Care CDS Visit(s).		Under Authorize Service					
Adams, Marge								No Authorize Service Not required for this patient							
Cezanne, Paul	2/1/2017-2/1/2018	Personal Care CDS	Per Date Range	0.00u	100.00% - 0.00u	0.00u	0								
Chagal, Marc	3/1/2016-1/31/2017	Homemaker / Chore	Monthly	248.00u	0.00% - 0.00u	248.00u	0	Create more Homemaker / Chore visits totaling 62 hours.		Under Authorize Service					
Chagal, Marc	3/1/2016-1/31/2017	Respite Care	Monthly	186.00u	0.00% - 0.00u	186.00u	0	Create more Respite Care visits totaling 46 hours and 30 minutes.		Under Authorize Service					
Chagal, Marc	3/1/2016-1/31/2017	Personal Care - In Home	Monthly	186.00u	0.00% - 0.00u	186.00u	0	Create more Personal Care - In Home visits totaling 46 hours and 30 minutes.		Under Authorize					

Quarterly Unit Usage Report

Filters	Sorting & Data Included
<ul style="list-style-type: none"> Year Quarter 	<p>Sorted by Visit Type Category.</p> <p>Includes: Agency, Visit Type Category, Total Paid Claims, Number of Patients, Total Units Authorized, Total Units Delivered, Agency Total.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
 - Time / Travel Report
 - Visit Closure Report
 - Report Printout
 - Skills Report
 - Workers Report

Support Ankota

Quarterly Unit Usage Report

Year: 2017 Quarter: First January- March

Refresh

1 of 1

Find | Next

Agency	Visit Type Category	Total Paid Claims	Nr. Patient	Total Units Authorized	Total Units Delivered	Agency Total
MO	CDS	1223.05	5	1798	1223.05	2201.75
MO	Nursing & Caregiving Support	364.7	4	372	364.7	2201.75
MO	Home Services2	614	2	868	614	2201.75

Invoice Summary Report

(Found under **Billing**)

Filters	Sorting & Data Included
<ul style="list-style-type: none"> Month Referring program Patient 	<p>Sorted by Date.</p> <p>Includes: Date, Agency, Name, Invoice Total, Amount, Type, Check Number, Account Number, Notes, Total Paid.</p>

- Dashboard
- Clients
- Actions/Requests
- Departments
- Refer Client
- Visits
- Caregivers
- Scheduling
- Reporting
- Billing
 - Billing Report(Patient)
 - Payroll Report(Worker)
 - Calculate Billing / Payroll
 - Billing Report(Agency)

Support Ankota

Invoice Summary Report

Select month: January, 2017
Referring Program: -- All --
Patient:
Refresh

1 of 1

Date	Agency	Name	Invoice Total	Amount	Type	Check Number	Account Number	Notes	Total Paid
1/19/2017	CDS MO	Consumer, Test	\$216.54						\$0.00
1/19/2017	IHS MO	Nieman, Leroy	\$138.00						\$0.00
1/19/2017	IHS MO	Nieman, Leroy	\$307.00						\$0.00
1/19/2017	CDS MO	Stock, Arthur	\$260.65						\$0.00
1/19/2017	CDS MO	Ford, Harrison	\$260.65						\$0.00
1/19/2017	IHS MO	Chagal, Marc	\$138.00						\$0.00
1/19/2017	IHS MO	Chagal, Marc	\$307.00						\$0.00

Mobile Forms

Mobile Forms allow users to the ability to work on electronic forms without being tied down to an internet connection.

But here are important facts about mobile forms before you get started...

1. Our solution was designed for tablets (like iPad or Android), but it will run on a PC as well. Pretty much anything with a modern browser (needs to support HTML-5) will be fine.
2. The solution is designed to [work offline](#) so you bring your visits in when you have internet access and then you can see patients all day and [synchronize your forms later](#).
3. If you add a visit during the day, the worker needs to get internet access and press refresh/synch.
4. We only bring one visit per patient at a time into the mobile (this is a best practice that encourages workers to turn in their paperwork on time and also makes sure that the mobile doesn't get "overloaded").
5. Similarly we only bring visits for a specific timeframe (example: 7 days back and 3 days forward). Again, this is so we keep people on schedule and don't overload the tablet.
6. Our solution brings the forms into the mobile device and caches the data in the browser.
 - a. Important note: we encrypt the data, but we mandate that the customer set [encryption](#) on the device. This way if the device is lost or stolen there's no HIPAA concern.
7. You can only work on your forms on one device at a time. The reason is that the forms are [offline](#) like a Word document and if two people are editing the same Word doc on two computers then they need to be manually synched and we are avoiding this.
8. When you logout, all of your forms are synched to the Ankota back end and you can change devices.
9. As an example, some clinicians do not like to document while they're with patients so they'll start the form at the patient home, record start time, enter vital signs, do the rest of their work, go back on their tablet at the end, record

the end time, then save the document as incomplete. Then later in the day, they logout of their tablet and login to their computer and fill in the rest, then synch.

10. The app tells you whether you're online or not.
11. It locks you out after a certain timeframe and requires your password to get back in.
12. You can also logout (which will synch your documents when in coverage). Otherwise you'll need to "unlock" when back in coverage and then logout.

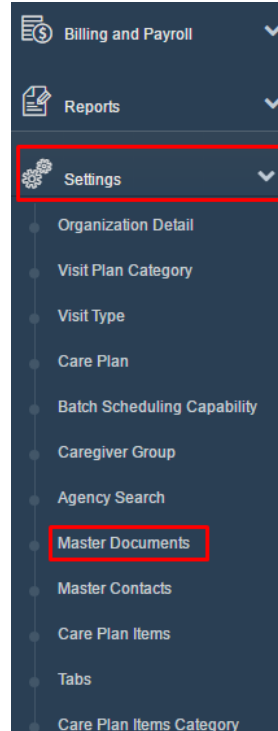
Setup

Creating a form or forms

Forms need to be built in our form designer (HTML Builder under settings However this has already been completed for you

Setting up rules for each form

1. Once a form is done, it will appear in Master documents under Settings



2. On this screen, you can configure rules for the form:

- a. The most common rule to configure is “when the form is submitted you should close the visit”.
 - b. You can also set rules like "if the missed visit form is submitted, change the visit type to missed visit and close it”.
3. There's yet another setting for sub-documents. The idea of this is that on an overall assessment form you might need sub-assessments based on this specific patient's needs (psycho-social, range of motion). This configures the subdocuments.

NOTE This is not yet available in the form builder.

Name	Description	File Name			
BHRS 48HR Check		BHRS 48 HR ParentCheck.docx	Carry Info Update Master Actions		
Continuity_of_Care_Record_CBC	Continuity_of_Care_Record_CBC	Continuity_of_Care_Record_CBC.htm	Actions Subdocuments		
Follow_Up_Phone_Call_CBC	Follow_Up_Phone_Call_CBC	Follow_Up_Phone_Call_CBC.htm	Actions Subdocuments		
Home_Visit_CBC	Home_Visit_CBC	Home_Visit_CBC.htm	Actions Subdocuments		
Hospital_Visit_CBC	Hospital_Visit_CBC	Hospital_Visit_CBC.htm	Actions Subdocuments		
Med_Tracking_Form_CBC	Med_Tracking_Form_CBC	Med_Tracking_Form_CBC.htm	Actions Subdocuments		

Action	
<input type="checkbox"/>	Close visit
<input type="checkbox"/>	Change service type - Not set -
<input type="checkbox"/>	Change status - Not set -
<input type="checkbox"/>	Send new request
<input type="checkbox"/>	Save frequency in authorize service
<input type="checkbox"/>	Save PDF file on client
<input type="checkbox"/>	Show on Visits Screen
<input type="checkbox"/>	Set T.S. client status - Not Set -
<input type="checkbox"/>	If non billable change visit type - Not set -
<input type="checkbox"/>	If non billable change status - Not set -
<input type="checkbox"/>	If non billable don't change visit type
<input type="checkbox"/>	Put data in Response Assessment table
<input type="checkbox"/>	Send form data to NetDirector

[Save](#) [Close](#)

Sub Documents

	Name	Description	File Name
<input type="checkbox"/>	BHRS 48HR Check		BHRS 48 HR ParentCheck.docx
<input type="checkbox"/>	Continuity_of_Care_Record_CBC	Continuity_of_Care_Record_CBC	Continuity_of_Care_Record_CBC.htm
<input type="checkbox"/>	Home_Visit_CBC	Home_Visit_CBC	Home_Visit_CBC.htm
<input type="checkbox"/>	Hospital_Visit_CBC	Hospital_Visit_CBC	Hospital_Visit_CBC.htm
<input type="checkbox"/>	Med_Tracking_Form_CBC	Med_Tracking_Form_CBC	Med_Tracking_Form_CBC.htm
<input type="checkbox"/>	NarrativeNote_CBC	NarrativeNote_CBC	NarrativeNote_CBC.htm
<input type="checkbox"/>	P1_NurseVisitReport.htm	P1_NurseVisitReport.htm	P1_NurseVisitReport.htm
<input type="checkbox"/>	Client_Caregiver_Response_Assessment_CBC	Client_Caregiver_Response_Assessment_CBC	Client_Caregiver_Response_Assessment_CBC.htm
<input type="checkbox"/>	Skilled_Nursing_Visit_CBC	Skilled_Nursing_Visit_CBC	Skilled_Nursing_Visit_CBC.htm

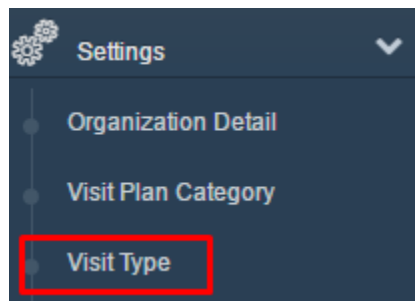
Save

Close

Associate a Form With a Visit Type

Next, we need the form to be associated with the visit type.

1. Select **Visit Type** from **Settings**.



2. Select the visit type that needs a form or forms.
3. In that visit type go to the **Documents** tab.
4. Put a checkbox in column 1* for each form needed** for this visit type.

NOTE We have 6 columns in case different customers need different form versions (e.g., with a different logo).

On a visit (not for this case but in general) there could be different outcomes. For example things can go fine and they fill out the main form for that type of visit. But in other cases they might also need to request physicians orders. Or maybe the patient was a no-show and they have to fill out a "missed visit" form.

Web Login

Next, the workers who will use forms need a web login to login to ankota.net/mobile.

NOTE We only set a mobile/IVR login for caregivers and create a web login for nurses or others who need the forms.

1. When creating a visit that has forms associated, the form(s) will be associated with the visit.
2. The visits need to be created and assigned to the nurse (or other clinician).
3. The user logs in to ankota.net/mobile with their web username and password.



NOTE Refer to Mobile Forms Overview for more details

4. When the clinician logs in, they will see their visits by date/patient/visit type.
5. To work on a visit, press the + to see the forms.

Pending visits

Cache status: noupdate

If the connection to the Internet is lost, you will see a warning at the top of the page and the submit button will be disabled.

Pending visits	Patient name	Agency	Type
3/9/2017 - 1 Item(s)			
+	Ankota, Test		Nursing

Toggle Clear Page 1 of 1 30 View 1 - 1 of 1

Process documents

Visits with completed documents
Visits with incomplete documents
Visits marked as complete

Pending documents

Pending documents	Name	Description	DownloadLink
New - 1 Item(s)			
+	P1_NurseVisitReport.htm	P1_NurseVisitReport.htm	

Toggle Clear Page 1 of 1 30 View 1 - 1 of 1

Toggle Clear Page 1 of 1 30 View 1 - 1 of 1

6. When you edit a form you can complete it, save as a draft, or reset to new.
7. You won't necessarily need to fill all the forms (described in the overview on page 3). This is normal. It does imply that the clinician know their job and what forms to fill. This has never been an issue.

Save Save incomplete Reset to New disable date/numbers time pickers Script version:17.03.020847 last update:2017-03-02 Status:Incorr

Nurse Visit Report

CLIENT DEMOGRAPHICS

Client Name: [] DCN: []

Address: [] County: []

Date: 03/09/2017 Time In: [] Time out: []

Visit Type: Initial Authorized RN Unannounced Supervisory 30-Day Perf RN 10% APC Monthly Annual

CLIENT ASSESSMENT

LOC: [] P/RISK: [] AIDE PRESENT: YES NO AIDE NAME: []

VITAL SIGNS: BP: [] PULSE: [] RESP: [] TEMP: [] BS: []

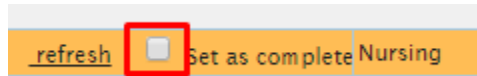
ORIENTATION: ALERT: [] FORGETFUL: [] AGITATED: [] LETHARGIC: [] ANXIOUS: []

8. There's color coding on the visits:

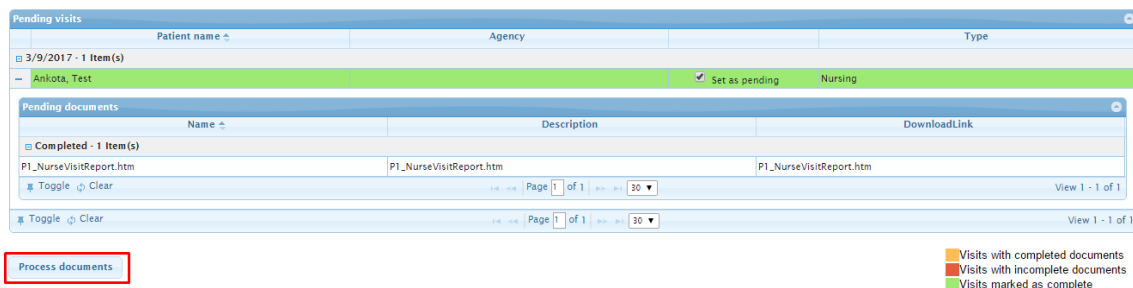
Visits with completed documents
Visits with incomplete documents
Visits marked as complete

- i. White: not started.
- ii. Red: there are forms saved as incomplete

- iii. Yellow there are saved forms (complete) but we don't really know which forms that they need to fill (e.g., they might need to fill two forms and after the first is done they save it and it turns yellow).
- iv. Green: when they're done (filled all the needed forms are complete) they have to push a button to set the visit to green.



9. When you have at least one green visit a new button pops up (or ungrays) letting you **Process Your Document**. **This requires internet access**. You will then be redirected to the completed visits screen.



10. Then it processes, applies all the rules on the server (like closing the visit), PDFs all of your documents, brings you those PDFs to look at, and brings in new visits (e.g., next visit for completed patients, new visits assigned while you were offline). This is subject to the constraints above (e.g., if the next visit is in two weeks it won't come to your device)
11. Click the back arrow on your browser to return to the Pending Visits Screen.

NOTE This was mentioned above, but to bring in new visits you can press refresh/synch.

Other Topics

[Distinguishing Between Consumer Directed and In-Home Services](#)

Three key differences exist between In-Home Services and CDS:

1. You will often have multiple authorized units, such as having Personal Care (in-home), Homemaker, and Respite. As a Best Practice, create the first authorization (e.g., for the Personal Care) and then perform the following steps:
 - a. On the Authorized Units tab, click the "Copy" button on the first service that you authorized. This will duplicate the information such as the start date, end-date, authorization number (if you entered it) and any notes.
 - b. Change the Visit type (e.g., if your first authorization was for personal care, change it to homemaker).
 - c. Update the number of units that are authorized (from your Cyber Access care plan).
 - d. If there are additional authorized services, repeat the previous through bullet items.
2. In the care plan, the services are organized into different categories corresponding to the visit types. So, you will need to choose the personal care tasks under Personal Care, the homemaker under homemaker, and the respite under respite. Here are some notes:
 - We've sometimes seen the same task under both personal care and homemaker. Please be sure to choose it under the correct category
 - In Respite, you should choose "Basic Respite" (only a small number of our customers use "Block").
 - Sometimes you will have "Advanced Personal Care" or "Advanced Respite"
3. When creating the visits, you need to set them up as back to back "contiguous visits."

Let's take an example for a client with the following authorized services:


- Personal Care - 186 Units per month (7 days a week)
- Homemaker - 248 Units per month (7 days a week)
- Respite - 186 Units per month (7 days a week)




- On the scheduling tab (under client) the system will tell you how many hours to schedule and it what date range:

Authorize Service: 3/1/2016-1/31/2017 Personal Care - In Home 7 days, 1.5 Hours per Day; 3/1/2016-1/31/2017 Homemaker / Chore 7 days, 2 Hours per Day; 3/1/2016-1/31/2017 Respite Care 7 days, 1.5 Hours per Day;

- When you set up the pattern, you need to schedule the three services "back-to-back." In this example, the Personal Care goes from 10:30-12:00, Homemaker goes from 1:00-3:00 and Respite goes from 3:00-4:30.

[Save All patterns](#)

Week 1 Pattern 

	Visit Type	Start Time	Duration	End Time	Caregiver
<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	Personal Care - In Ho ▼	10:30 AM	1 h 30 m	12:00 PM	Aniston, Jennifer ▼ 
<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	Homemaker / Chore ▼	12:00 PM	2 h 0 m	02:00 PM	Aniston, Jennifer ▼ 
<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	Respite Care ▼	02:00 PM	1 h 30 m	03:30 PM	Aniston, Jennifer ▼ 

[Add Another Line](#)

IMPORTANT To add another service (or perhaps another caregiver or another time to the schedule pattern) press Add Another Line and DON'T press "Add another Week." Add another week if for the rare case when the caregivers vary week by week.

Workflow

Office Manager Functions (Daily/Weekly/Monthly Calendar)

Here is an overview of the office manager functions (Daily/Weekly/Monthly calendar):

Start of Day and perhaps once or twice later in the day

1. Look for any visits for prior days that are not closed (dark green).
 - a. Light green:
 - i. Cancelled? Cancel it in the system.
 - ii. Rescheduled? - change the scheduled date/time in the system.
 - iii. Forgot to clock in? - get time sheet and report visit completion.
 - b. Brown (which will mean "purple that we autoclosed").
2. Forgot to clock out - get time sheet and report visit completion.
3. Clear up any red magnifying glasses

Weekly

1. Check Authorized Service Warnings to see if anyone is running majorly over or under, and make adjustments.

At Billing time

1. Run Billing and EMOMED submission process.

At Payroll time

1. Run Payroll.

20th of the month

1. Look at authorized service warnings and make adjustments to visit times.
2. Look at your authorized service warnings for next month and consider adjustments. For example, in February with 3 fewer days you may be able to add a unit per day or more to some schedules'.

25th of the month

Look at authorized service warnings and make adjustments to visit times.