Mobile Caregiver+
Mobile Application User Guide

Date: March 14, 2023

Version: 4.1.0

1. System Requirements

Each Provider Agency must designate at least one Provider Administrator (Provider Admin) during the registration process. Depending on the Payer and the Program, Provider Admins may be responsible for one or more of the following:

- Creating and Managing Mobile Caregiver+ User Accounts.
- Creating and Managing Mobile Caregiver+ Recipient Accounts.
- Task management for billable services.
- Scheduling, monitoring, and management of visits.
- Running reports

All Users must have registered Mobile Caregiver+ User accounts to log in to the Mobile Caregiver+ Provider Portal.

All Caregiver+ mobile software applications will support the current and two most recent versions of the following software, as long as the developer continues to provide support to ensure that the application meets EVV security requirements:

1.1. Hardware Requirements

EVV Hardware and Software Requirements	
Supported PC Operating Systems	• Windows OS (32 or 64 bit).
Supported Mobile Operating Systems	• iOS. • Android.
Supported PC & Mac Browsers	• Microsoft Edge. • Google. • Apple Safari. • Mozilla Firefox.
Supported Mobile Browsers	• Google Chrome. • Apple Safari.

EVV Hardware and Software Requirements	
Mobile Device Requirements	• Form Factor: Tablet or Smart Phone. • Operating System: Android or iOS (see above.) • Bluetooth required: No. • GPS required: Yes. • Voice support required: No. • Min memory of phone: No minimum. • Min storage of phone: 50 MB.

1.2. Mobile Device Management Requirements

If the Mobile Caregiver+ app is going to work in a mobile device management (MDM) solution, the MDM solution must be configured to enable MDM to access the mobile app.

Note: If listed as Optional below, EVV will still be possible. If listed as Required, EVV will not function effectively without the privilege. Cellular data or Wi-Fi data is required, but a user doesn't need both.

MDM Access	Required/Optional	Reason
Camera	Optional	For user to take avatar picture.
Face ID (when available)	Optional	For biometric app login.
Fingerprint ID (when available)	Optional	For biometric app login.

MDM Access	Required/Optional	Reason
Location Services	Required	For geo-location of visit check-in / check-out.
Photo Library	Optional	To allow user to select avatar picture.
Mobile Data	Required (unless user accesses internet only via Wi-Fi network)	For internet access.
Wi-Fi Data	Required (unless user accesses internet only mobile network)	For internet access.
File Storage	Required	For local encrypted storage of working data.

Related Topics

- Logging In
- Provider Portal Overview
- Viewing the Main Menu
- Changing Refresh Settings

- Commonly Used Icons and Controls
- Logging Out
- Terminology
- Acronyms

2. Overview

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The Mobile Caregiver+ delivery solutions offer the functionality you need to support your Electronic Visit Verification (EVV) requirements. This powerful technology enables Netsmart clients to verify provider visits for personal or home-based services. The data collected during personal and home health services enables care providers to record details of field visits using a mobile phone or special purpose device. Caregivers record their visit using an app or voice call, including accurate location information, type of service provided and duration of service.

Netsmart's EVV Solution provides a downloadable mobile application that you can access on your smartphone or tablet. The app allows caregivers to view their schedules, get turn-by-turn directions to the recipient's location, and record and verify visit details on location, making it easy and efficient for both you and your provider agency.
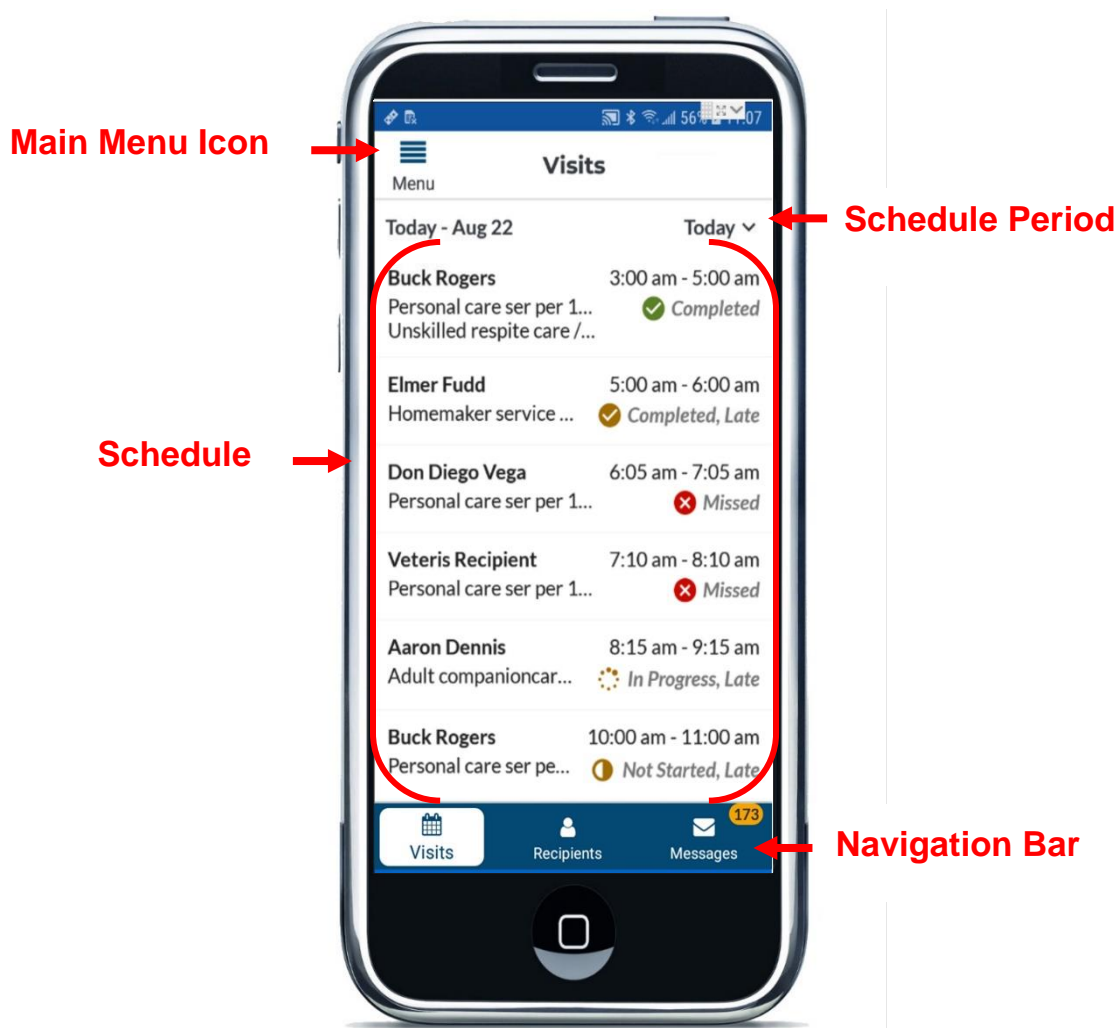
The Mobile Caregiver+ App:

- Is customized and displays your schedule, the recipient's complete care plan with service detail and the recipient's profile.
- Allows validation and verification of services with an electronic signature.
- Allows agency administrator to communicate safely and securely with Caregivers.

The app's home screen (which displays your schedule) has these components:

- **Main Menu:** Located at the top left of the screen, the menu provides options to update your profile, choose face or fingerprint ID if your device offers this, change or update your password, get additional help with the mobile application, view linked provider agencies, choose the display language for the application, review Netsmart's privacy policy, and log out.
- **Schedule** period dropdown: Located to the right of the home screen where you view your schedule, the Schedule period dropdown allows you to select the time-period when you want to see your schedule. You have the options of selecting Today (the default), Last Week, This Week, Next Week, or The Last 45 Days.
  Navigation Bar: The Navigation Bar, located at the bottom of the screen, allows users to view and manage MCG+ mobile application objects i.e. scheduled visits, Recipients, and/or messages

- **Visits**: Displays your schedule for the schedule period you select. For each scheduled visit, you will see the visit day, date, time, recipient's name, and the visit status (**Not Started**, **Not Started Late, Missed**, **In Progress, In Progress Late, Completed Late,** and **Completed**).

- **Recipients:** Displays a list of Recipients that are assigned to the current Caregiver. Caregivers can use the Recipients List to view the Mobile Caregiver+ EVV profiles for Recipients that they are assigned to work with.

- **Messages:** Displays a list of text message and alerts that have been sent to and sent by the Caregiver. Caregiver can view HIPAA compliant text message that have been sent from the Mobile Caregiver+ Provider Portal.

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3. Terminology

The following terms are used throughout the application and throughout this User Guide:

- **Provider Administrator (Admin):** A Mobile Caregiver+ User Role that grants a User full access to all available features and functions of the Provider's Mobile Caregiver+ Provider Portal. The Fiscal Agent and Fiscal Intermediary roles also grant Users the same access privileges as an Administrator. Users assigned the role of Administrator, Fiscal Agent, or Fiscal Intermediary will have access to data for all recipients in the provider agency. Depending on the Payer and Program, Administrators may have rights to manage some, or all, objects in an agency's Provider Portal.
  Note: Multiple User roles can be assigned to a single User account. For example, if a User works in the Office as an Administrator and assists in providing coverage for Caregivers, the User will have to be assigned both the Provider Administrator Role and the Caregiver Role.

- **Caregiver**: A limited Mobile Caregiver+ User Role that grants Users access rights to login to the Mobile Caregiver+ app to complete scheduled visits. The Caregiver User role is usually assigned to the following: Live-in Service Providers, Rendering Providers, Billing Providers, Home Health Aides, Adult Daycare Providers, Providers, Community Mental Health Providers, Agency Providers, PDS Employees, Independent Providers, Service Providers, Participant Directed Service Providers, Personal Care Providers, Group Home Providers, Direct Care Workers, Direct Service Providers, Non-Agency Providers.

- **Healthcare Common Procedure Coding System (HCPCS codes):** A standardized healthcare coding system that is used primarily to identify services provided. Also known as: Service Description, Billing Codes, Procedure Codes, Revenue Codes. (See also Service Codes).

- **Modifier:** (Supplement to the HCPCS Codes/Service Codes) two characters used for billing, to provide extra details (when applicable) concerning a service/care provided by a Caregiver. Note: Not all service codes have modifiers.

- **Agency:** A business established to provide a service and employ individuals to render care. Also known as**:** Traditional Home Health Agency, Fiscal Management Agency (FMA), Provider Agency, Billing Provider.

- **Payer:** The health plan or organization that provides payment to the Caregiver or Agency that provides the services to its Recipients.
- **Prior Authorization/Service Authorization:** Health plan authorized care for a Recipient for a specified period unit (time increment for a service code) or number of visits.
- **Recipient:** An individual receiving services/care. Also known as: Client, Participant, Individual, Family Member (child, parent, spouse, etc.), PDS Employer, Beneficiary.
- **Schedule:** Includes one or more visits that are most often planned by Provider Admins for Caregivers to render services to Recipients. Caregivers may need to schedule a visit when a new service is required over a weekend, for example, when a Provider Admin is not available.
- **Service/Service Code:** Used to define the type of service being rendered and the amount of time allotted for that service (unit). Service codes may include a series of tasks. For example, Unskilled Respite Care may include tasks such as cleaning or grooming. Some, but not all service codes, may have modifiers which may reflect multiple Recipients, same day, or time of day of visit, etc.
- **Visit:** A scheduled date, time, and place for a Caregiver to provide services to a Recipient and the services to be provided.

4. Getting Started

Click a topic below:

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    Android

    Apple iOS

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4.1. Installing Mobile Caregiver+ Mobile Application

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The Mobile Caregiver+ application can be downloaded via the app stores available on any smart mobile device.

4.1.1. Installing Mobile App on Android Devices

i. On your Android device, locate the Play Store.

ii. Open the Play Store app.

iii. Search, or browse, for Mobile Caregiver+.

iv. Select the Mobile Caregiver+ app.
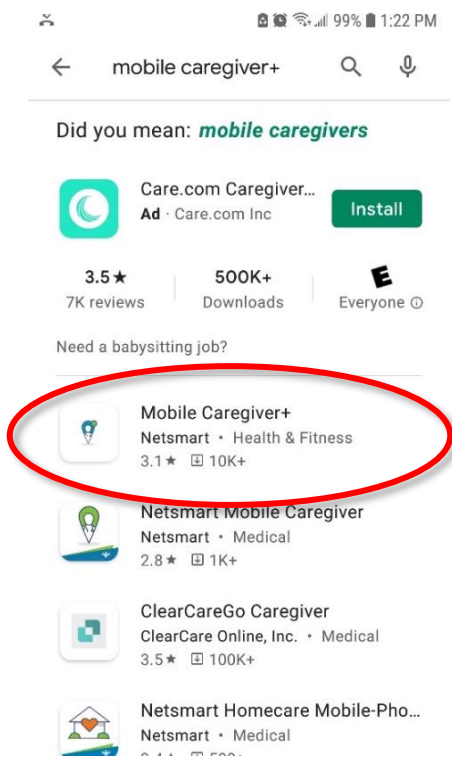
v.　Tap Install.
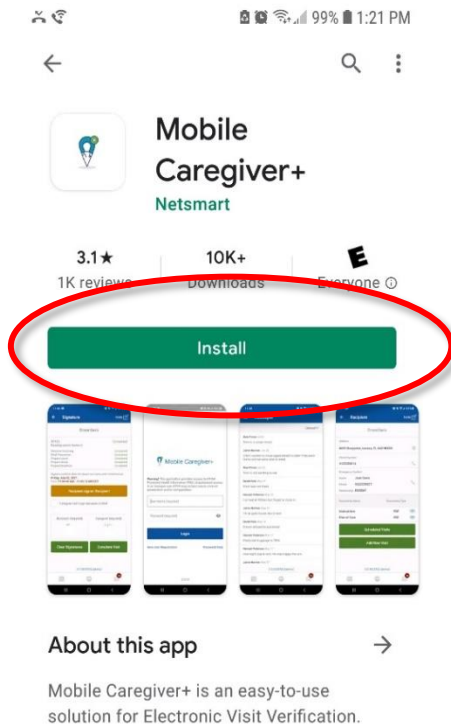
4.1.2.　Installing Mobile App on Apple iOS Devices

i.　On your iPhone, iPad, or iPod Touch, locate the Apple App Store.

ii.　Search, or browse, for Mobile Caregiver+.

iii.　Select the Mobile Caregiver+ app.

iv.　Tap **Get** on the right side of the screen, then follow the instructions to **Install.**

v. If prompted, enter your Apple login credentials.

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4.2. Updating Mobile App

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Netsmart regularly releases updates to the Mobile Caregiver+ application. Beast practice recommendation is that Users should update the application to the most current version. It is recommended that Caregivers enable notification alerts for the Mobile Caregiver+ mobile app – this will enable the application to notify Caregivers when updates are available.

To confirm the version of the Mobile Caregiver+ mobile application on your smart device, open the Mobile Caregiver+ mobile application from the smart device. The version number appears at the bottom of the Login screen.
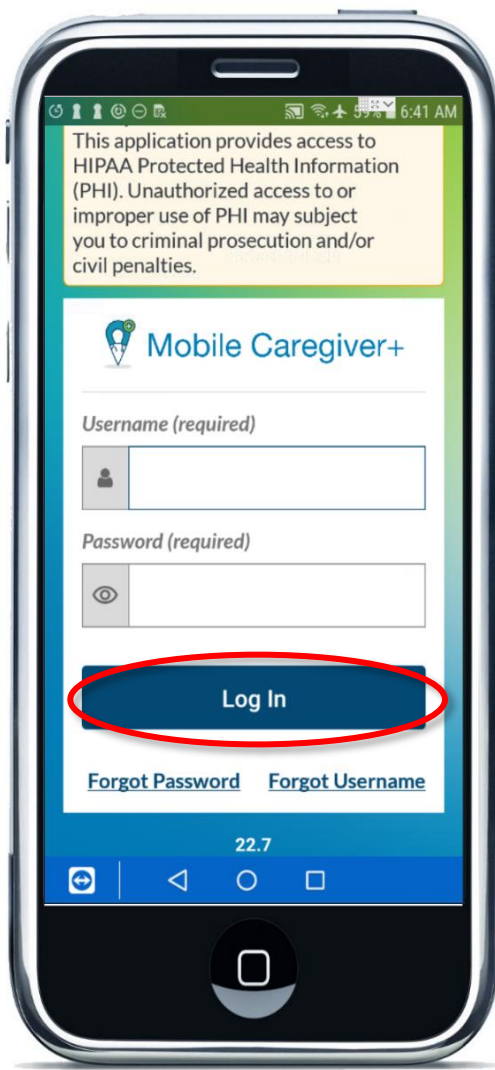
Netsmart Mobile Caregiver+ will support the current and two most recent operating systems for both Apple and Android devices if the manufacturer continue to provide support to ensure the operating systems meet current EVV requirements. Please refer to the guides and resources from your device's manufacturer for the most current information on any operating system updates.

4.2.1.   Updating Mobile Caregiver+ on an Android Device

i.   On your Android device, go to Play Store.

ii.   Search for the Mobile Caregiver+ app.

iii.   If an update is available, tap **Update**.

4.2.2.   Updating Mobile App on Apple iOS Devices

i.   On your Apple device, go to the App Store.

ii.   Search for the Mobile Caregiver+ app.

iii.   If an update is available, tap **Update**.

Note: If your device support auto updating, it is best to set the device to "auto update."

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4.3. Logging In

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New users and users that reset their passwords, will receive two emails, one with a username and another with temporary password.

Note: If you do not see the email, check your Junk or Spam folder.

To log into Mobile Caregiver+ mobile application:

1. Tap the Mobile Caregiver+ icon to launch Mobile Caregiver+.

2. Enter your Username and temporary password.

3. Tap **Login**.
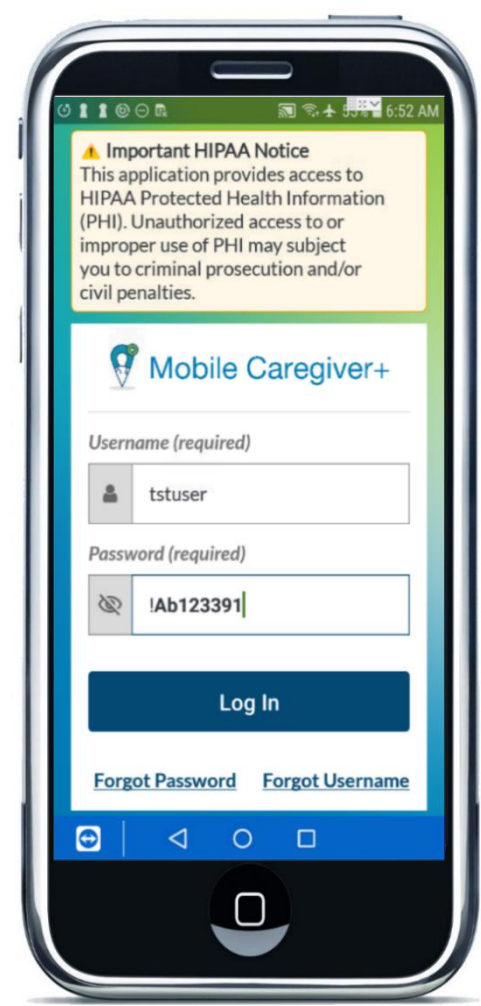
Note: The system will display the Update Password screen, which will allow the user to update the expired password.

4. From the **Update Password** screen, enter your new password in the **New** Password field.

5. Confirm and re-enter the new password in the Confirm Password field.

6. Note: Password characters are masked by default. Tap the "eye" icon, ⬿, on any of these fields, to see your entry.

7. Tap **Update Password**.
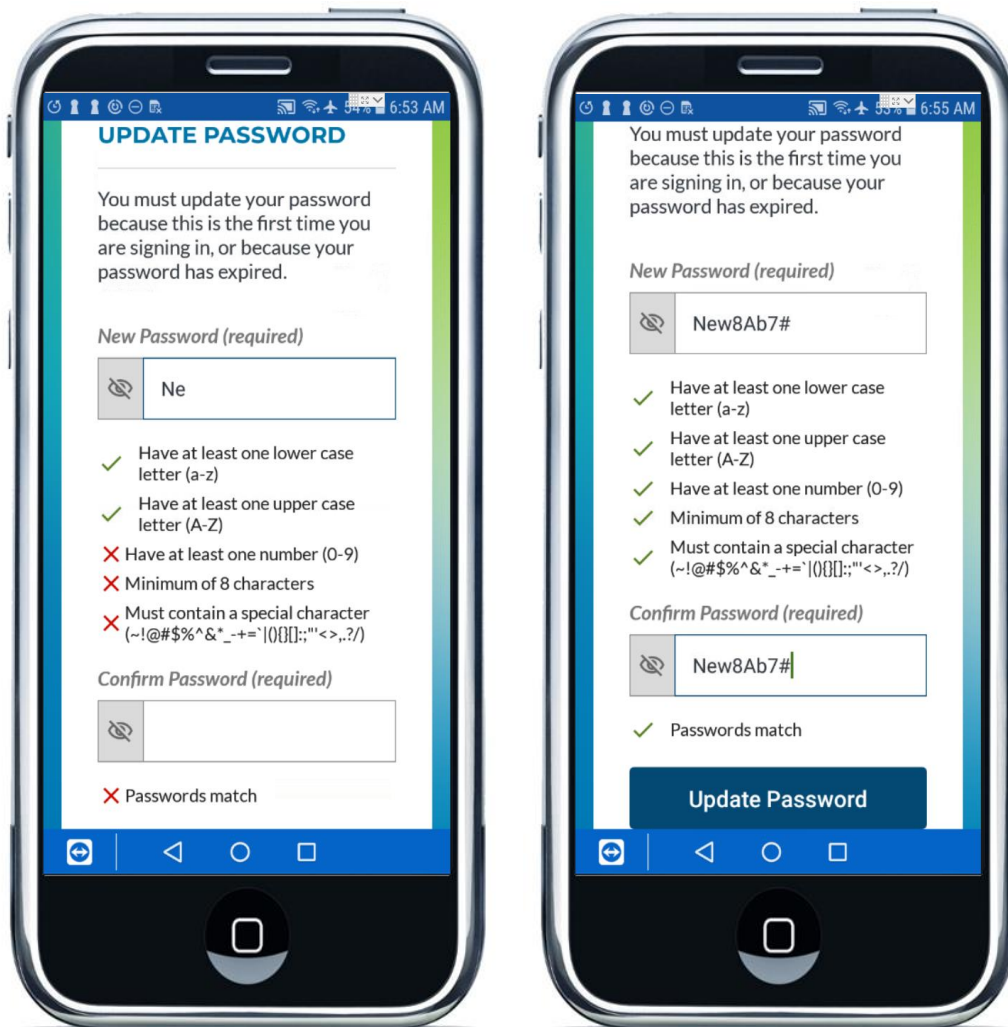
All passwords must meet the Mobile Caregiver+ password complexity requirement listed on the Update Password screen:

- Passwords must be a minimum length of eight characters.
- Contain at least one number.
- Contain at least one upper-case letter.
- Have at least one lower-case letter
- Contain at least one special character i.e., $@!%*?&.
- Users cannot reuse any old passwords nor "dictionary" words.
  Note: The system will initially display a red "✕" next to each requirement that must be met; the system will display a green "✓" for each password requirement that has been met.

  The system will return the user to the Login screen after the password has been successfully updated.

  Warning: *Do not write your password on any object that is accessible to others, rather memorize your password to keep it private.*

8. Login using the updated password.
9. For new users, the system will prompt you to create a 4-digit numeric PIN.

NOTE: The user will have 5 attempts before the mobile application locks them out. However, the user may revisit and attempt to login within 30 minutes. If the user forgets the new password, they can reset and get password help.

You will remain logged in until you log out of the app; however, the app will lock any time your device goes to sleep or any time you navigate to a different app. To unlock the Mobile Caregiver+ mobile application, enter your four-digit PIN or the biometric alternative option, i.e., finger print, face ID, that you have enabled.

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4.4. Resetting Forgotten Password

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If you forget your password, you can reset it from the Mobile Caregiver+ Login screen:

To reset your Mobile Caregiver+ password:

1. From the Mobile Caregiver+ mobile application Login screen, Tap **Forgot Password**.
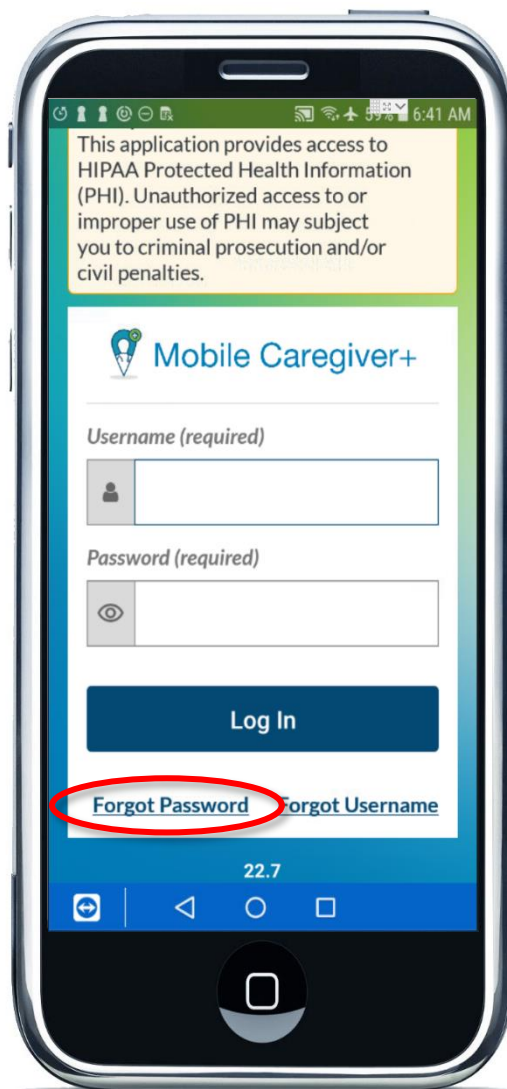
2. Enter the unique email address, Username, or phone number listed in your Mobile Caregiver+ User profile.

3. Tap **Send Temporary Password**.
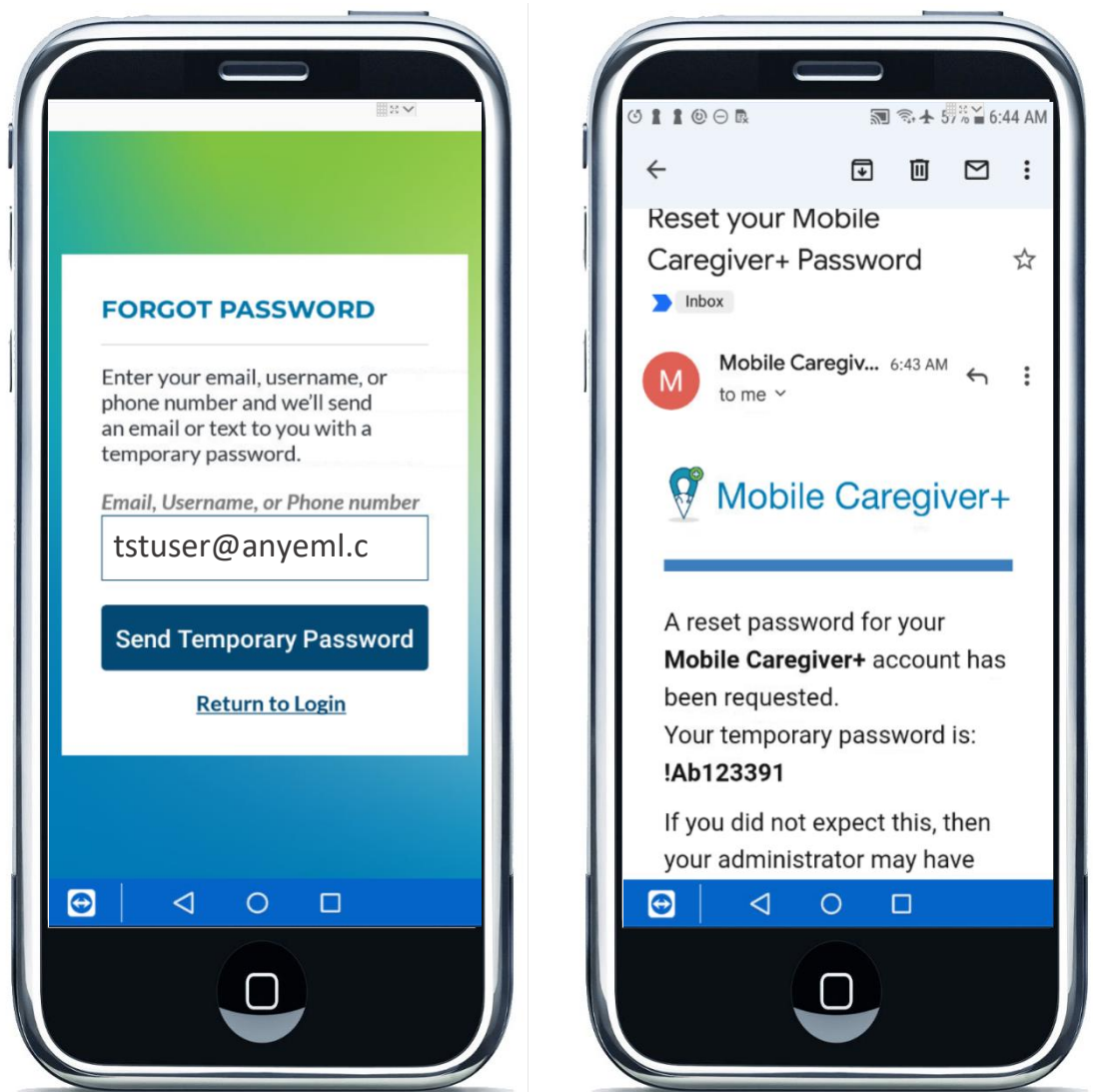
You will receive an email or a text message, depending on whether you entered your email address or phone number, with the subject line "Reset your Mobile Caregiver+ Password." It will contain a temporary password that you can use to login; the system will prompt you to change your password.

4. Copy the temporary password and return to the Mobile Caregiver+ Login screen; be sure to copy all character in the temporary password. Note that the first character in this password is an exclamation mark.

5. Enter your Username.

6. Enter the temporary password.

7. Tap **Log In**.
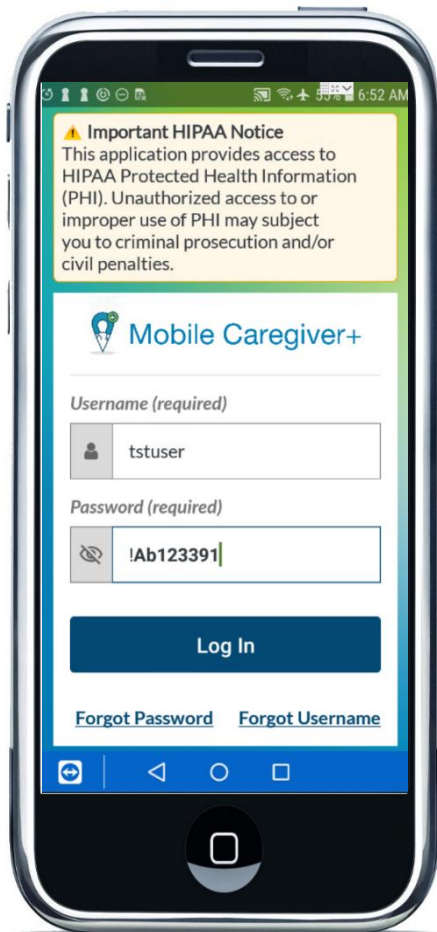
Note: The system will prompt you to update your password.

8. Enter your new password in the **New Password** field.

Note: All passwords must meet the following requirements:

- Length – Passwords must be a minimum length of eight characters.
- Complexity – Passwords must contain at least one, number, one upper-case letter, one lower-case letter, one number, and one special character ($@!%*?&).
- Reuse – Previous passwords cannot be reused.

- The system initially displays a red "✗" next to each requirement that must be met; the system will display a green "✓" for each password requirement that has been met.

9. Re-enter your new password in the **Confirms Password** field
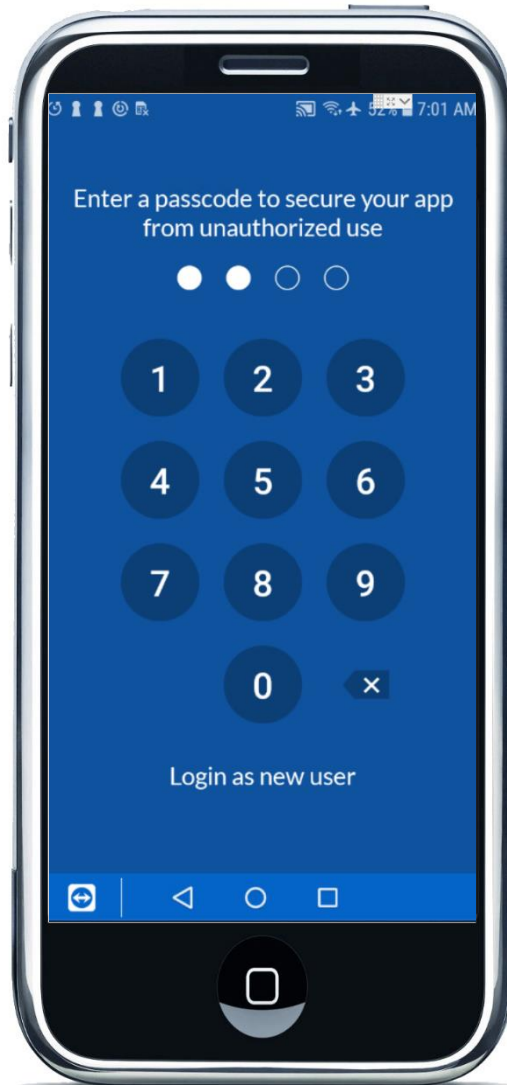
The system will return the user to the Login screen after the password has been successfully updated.

Warning: *Do not write your password on any object that is accessible to others, rather memorize your password to keep it private.*

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5. The Visits Screen

When you log in to the Mobile Caregiver+ mobile application, the system will display the Visits screen, which displays your schedule for the current day. The default schedule view is '**Today.**'

Tap the time-period drop-down list in the upper right corner to choose another time period: **Last Week**, **This Week**, **Next Week**, or **Last 45 Days**.
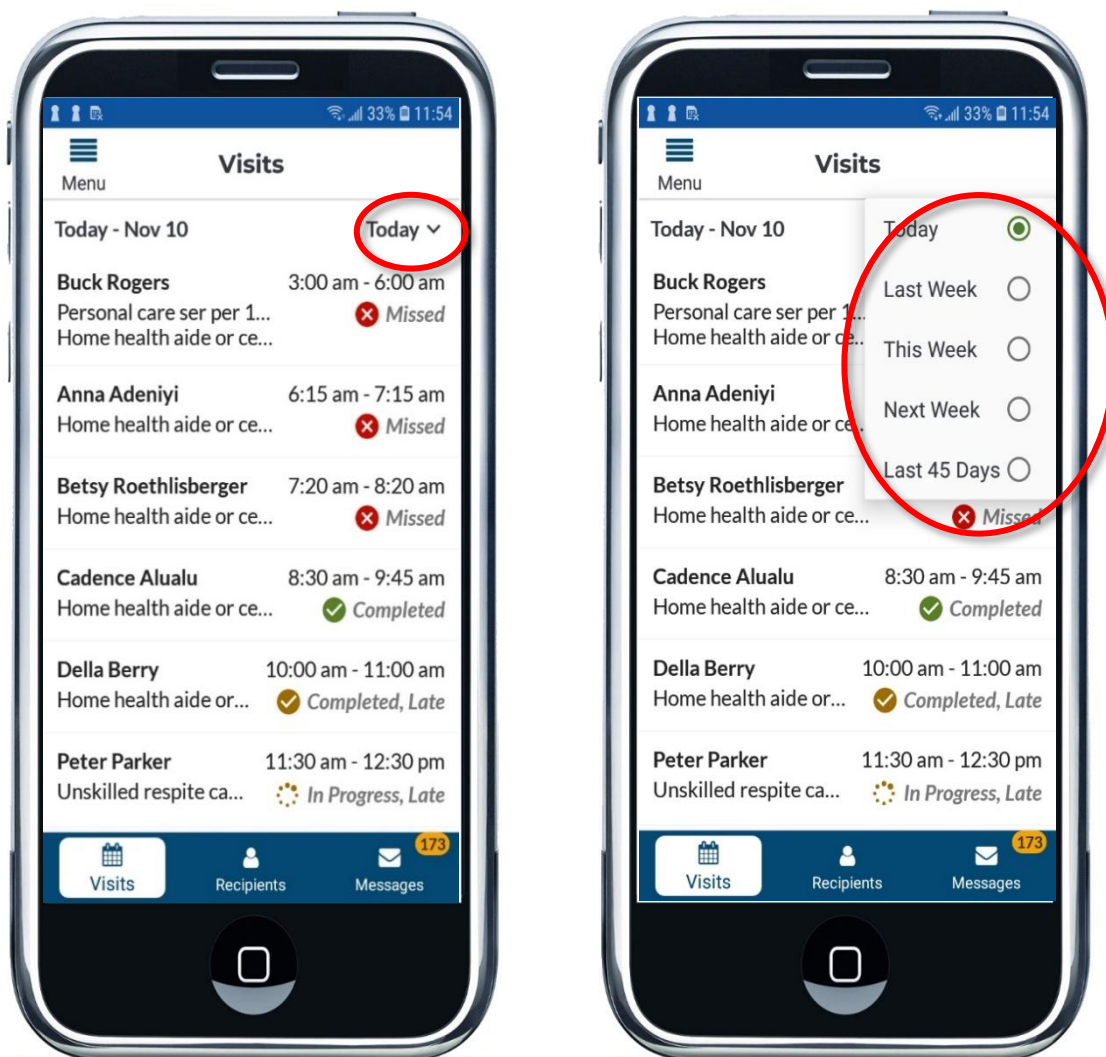
*Note: The **Visits** screen will display the schedule for the time-period you select.*

5.1. Visit Status Indicators

Visits are color coded. The color of the dot on the right side of each visit indicates the **Status** of the scheduled visit:

Status Icon	Visit Status	Description
Completed	Completed	Visit successfully completed within the scheduled time.
Completed, Late	Completed, Late	Visit successfully completed after the scheduled time.
In Progress	In Progress	Visit is currently in progress and within the scheduled time.
In Progress, Late	In Progress Late	Visit is currently in progress, however, was started late, or going over the scheduled end time.
Missed	Missed	Visit was not completed on an EVV device, no record of visit data.
Not Started, Late	Not Started Late	Visit start time has already passed, however service has not been started on EVV device.
Not Started	Not Started	Visit scheduled for a future date/time i.e., later in the day, the next day, etc.

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6. Main Menu

The Main Menu allows Caregivers to configure setting for the mobile application, view and update their Mobile Caregiver+ profiles, obtain help, view agencies to which their account are currently linked, view the Mobile Caregiver+ Privacy Policy, and to log out of the mobile application.

6.1. Accessing the Main Menu

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The **Main Menu** icon, sometimes called the "hamburger" icon, is in the upper left-hand corner of the Mobile Caregiver+ screen.

To access the Main Menu:

1. Tap the **Main Menu**, ≡, icon to display Main Menu.

2. You can access the features listed below from the **Main Menu:**
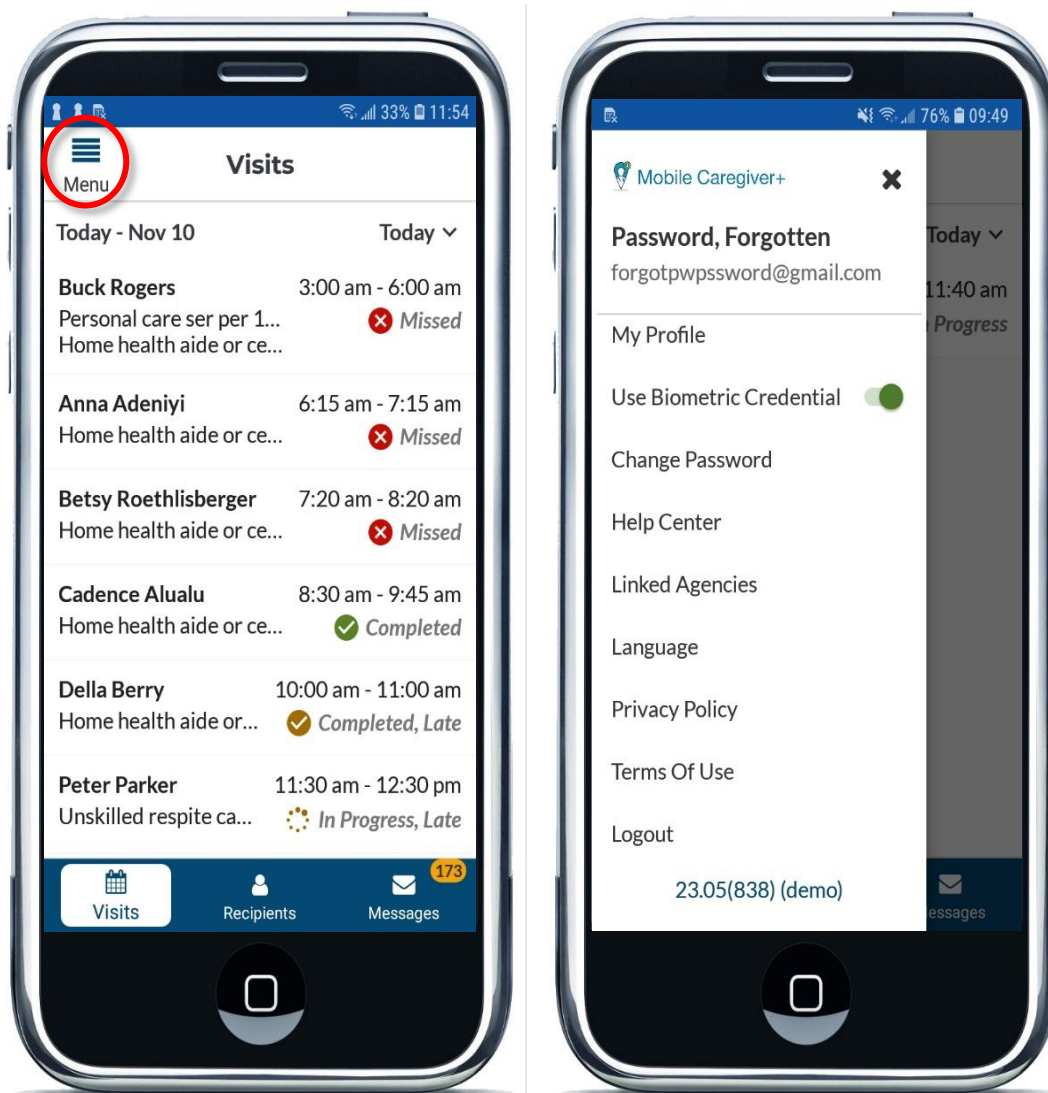
6.2. Main Menu Options:

- **My Profile**, displays and allows you to update your profile data; use Manage Profile to update your email address, phone number, home address, and other personal information.

- **Use Biometric Credential**, allows you to turn on biometric authentication, where Users can scan their face or fingerprint, instead of entering a four-digit PIN, to access the Mobile Caregiver+ mobile application. This function is available only on devices which have fingerprint ID or face ID capabilities. Turn on biometric authentication by tapping on the switch (the switch will appear on the right with a green background when the feature is on).

- **Change Password**, allows you to change your password. User passwords must meet the following requirement: passwords must have at least 8 characters, 1 upper case letter, 1 lower case letter, 1 number, and 1 special character.

- **Help Center**, provides access to in-app support and the contact phone number for Netsmart MCG+ Client Support.

- **Linked** Agencies, displays a list of all the agencies/locations to which your account is currently linked. Any agency/location you work with should appear. If you do not see your agency, contact your Provider Amin.

- **Language**, allows you to select the display language for the Mobile Caregiver+ app.

- **Privacy Policy**, allows you to review Netsmart's Privacy Policy, and gives you information on Netsmart's practices for collecting, using, maintaining, protecting, and disclosing personal information shared in the Netsmart EVV Software.

- **Terms of Use**, displays Netsmart's Mobile Caregiver+ Terms of Use policy: Users cannot access or use Netsmart's Mobile Caregiver+ mobile application and Provider Portal if they do not accept the Terms of Use.

- **Logout**, allows you to log out of the app.

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6.2.1. Managing Your Mobile Caregiver+ Profile

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You can update your Mobile Caregiver+ User Profile from the Main Menu. Follow these steps to update your profile:

i. Tap the **Main Menu** icon, in the upper left-hand corner of the screen.

ii. Tap **My Profile**.
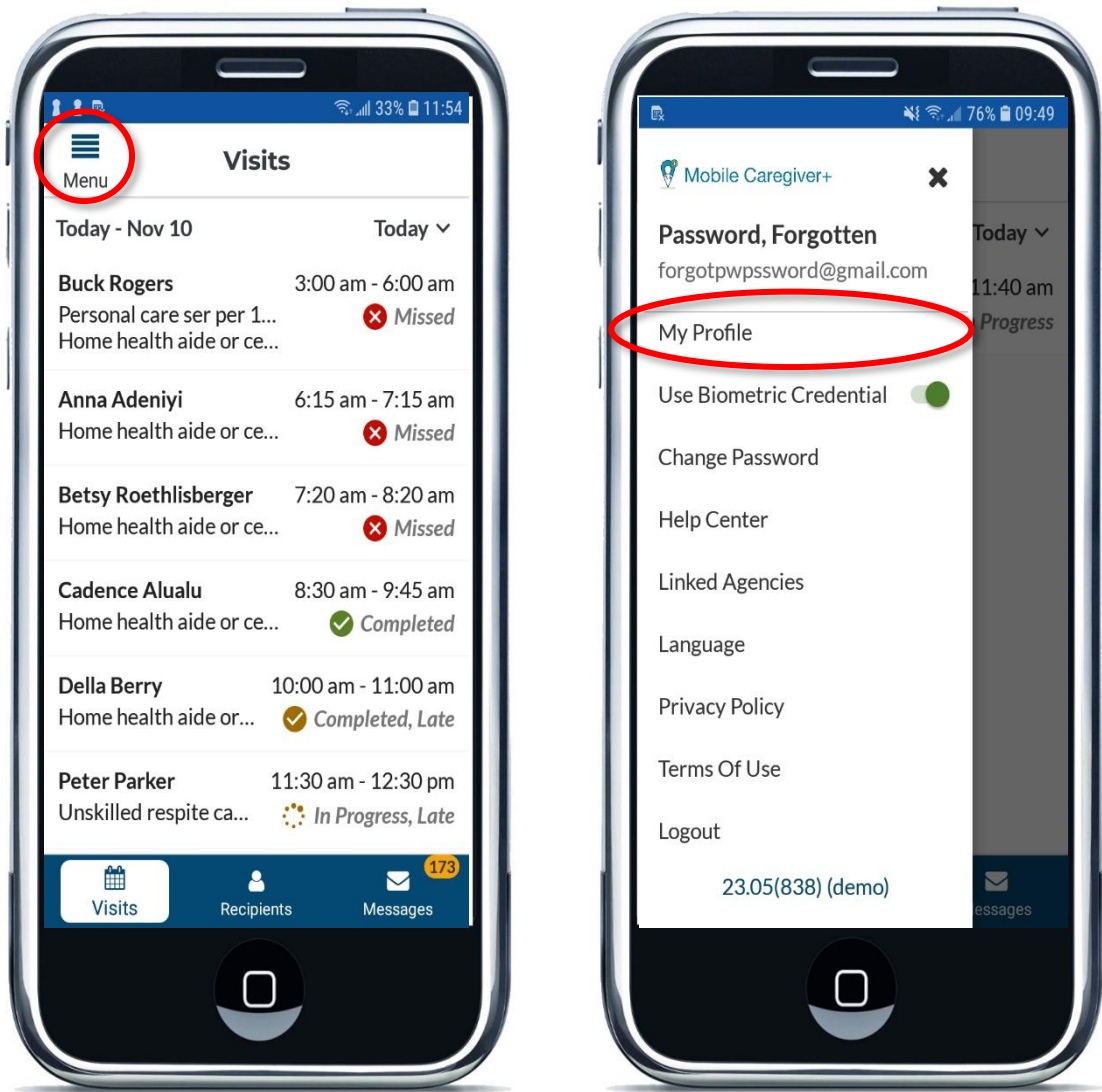
*Note: Any fields with * are mandatory, you are required to enter data in mandatory fields.*

Add an option user icon photo: Tap the Mobile Caregiver+ icon and either take a new picture or select from your existing photos.
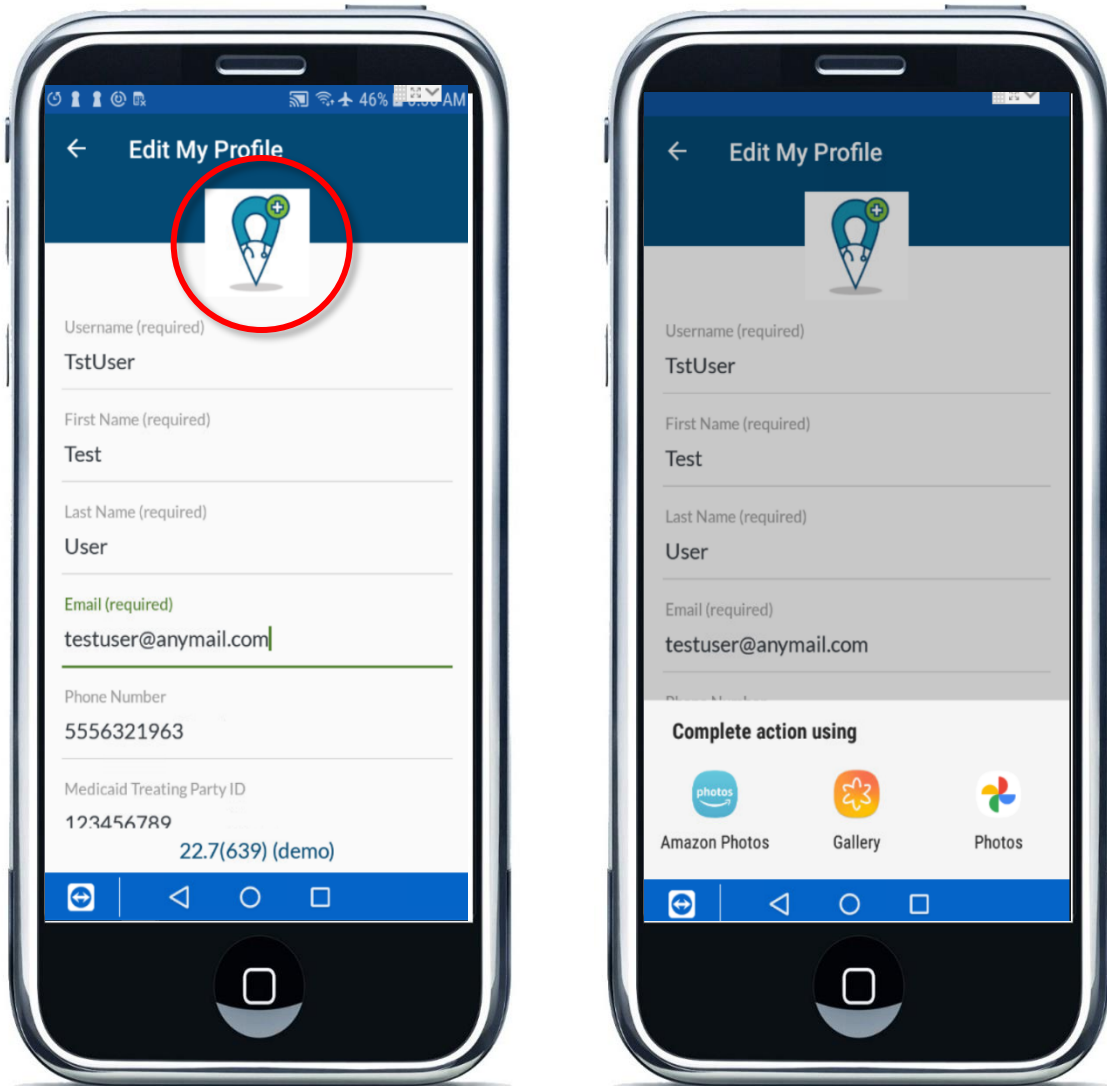
iii. Update your profile to reflect any changes – refer to the list below for additional information on Mobile Caregiver+ profile settings.

- **Username: WARNING –** do not change your Username.
- **First Name** and **Last Name** can both be changed.
- **Email:** Update your email address if needed. Remember, while users may have a common phone number or a common email address, no two users can have the same phone number and the same email address in their MCG+ User profile, the combination of the two must be unique.
- **Phone Number:** Update your phone number if needed. Remember, the combination of email and phone number must be unique for each user, so do not use the main number for an agency.

  Note: For users who work for more than one Home Health Agency, the same username and password CAN be used for all agencies.
- **Rendering Provider ID/Medicaid ID:** Update the 9-digit ID assigned to you if you have one.
- **IVR PIN:** Do not enter an IVR PIN if you are using the Mobile Caregiver+ application to complete visits. Please leave this field blank.
- **Caregiver Type:** Use the drop-down list to change your position or role, if needed.
- **Date of Birth:** Tap the calendar icon to open a calendar to select your date of birth.
- **SSN last 4:** Enter the last four digits of your social security number. You must either enter the last 4 digits of your Security or 5 to 9 digits of your Social Security number.
- **Address Line 1**, **Address Line 2**, **City, State**, and **Zip** are optional fields.

iv.   When you finish, tap *Save* at the bottom of the screen.

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6.2.2. Enabling Biometric Credentials

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Once you have logged into the Mobile Caregiver+ mobile application, you will remain logged in until you log out of the mobile app; however, the mobile app will lock at any time your device goes to sleep or at any time you navigate to a different app. To unlock the Mobile Caregiver+ mobile application, you have the option to either enter your four-digit PIN or use the biometric alternative option. This includes scanning your fingerprint or face ID as a security measure, to reactivate the application.

If your device permits this function, the **biometric credential** function will be available to turn on, if your device does not permit this function, you will not have the ability to enable the function.

To enable the biometric credential function:

i.   Tap the **Main Menu** icon, in the upper left-hand corner of the screen.

ii. From the Main Menu, tap the **Use Biometric Credential** switch.
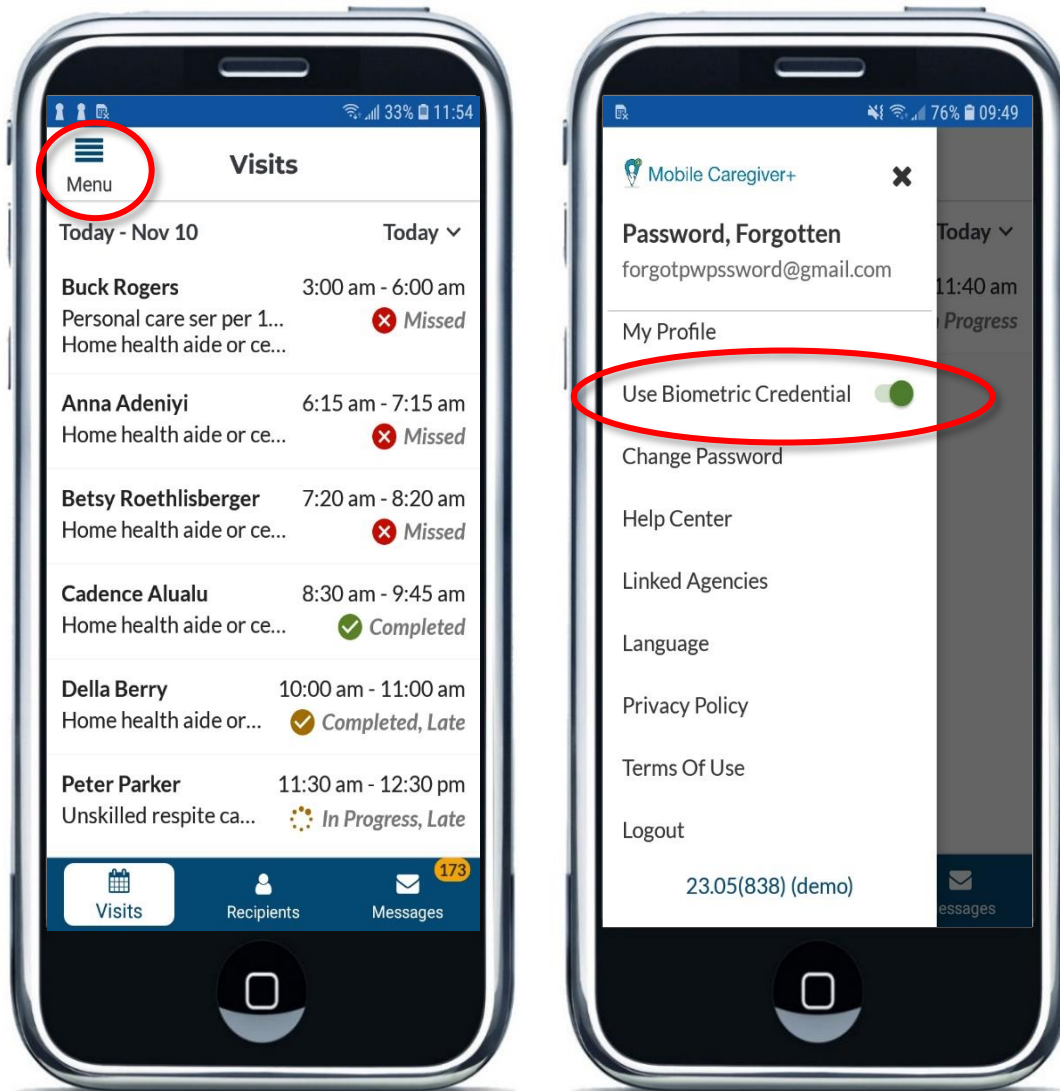
Note: If the User Biometric Credential option is activated, the switch will turn green. If it is not activated, it will be grey.

Once the biometric authentication has been enabled and the app locks, the next time you attempt to reactivate the mobile app, you will be prompted to scan your fingerprint or face ID to unlock the session.

6.2.3.   Changing Your Password

You are here: Mobile Caregiver+ > Getting Started > Changing Your Password

Users can proactively change their passwords as part a security measure. You can reset your password by following the steps below:

i.   Log in to the Mobile Caregiver+ mobile application.

ii.   Tap the **Main Menu** icon in the upper left-hand corner of the screen.

iii.   Tap **Change Password**.
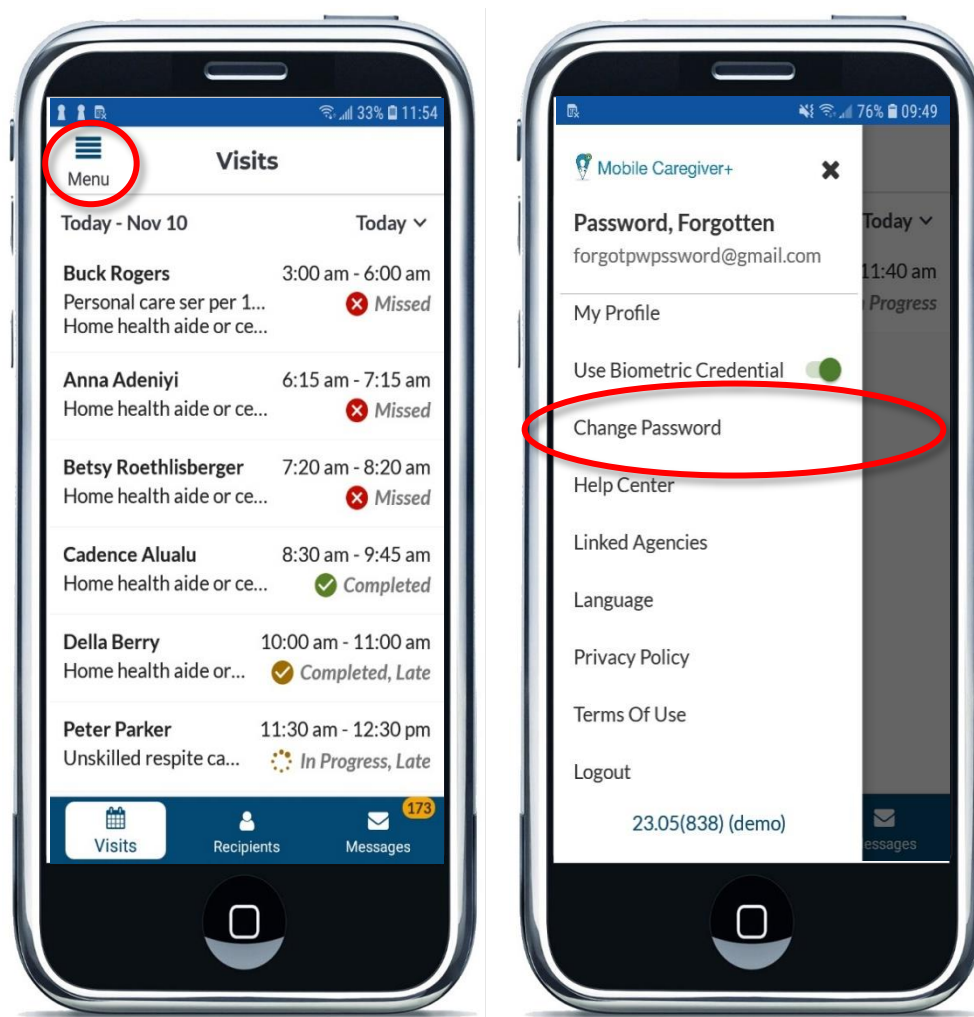
iv.   When the **Update Password** screen appears, enter your **Current Password**, your
        New Password and then retype your new password in the **Confirm Password**
        field.

v.   Tap **Update Password**.
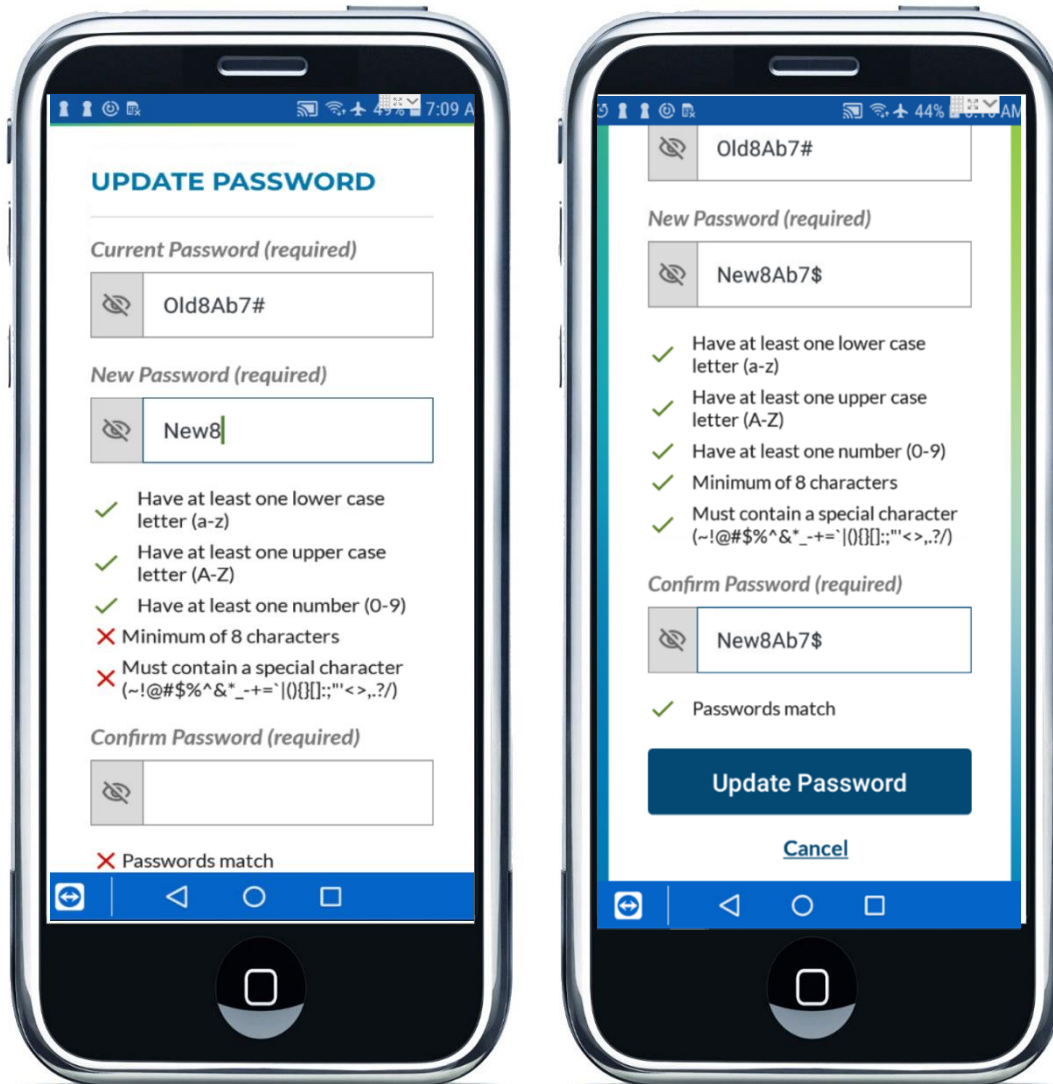
Related Topics

- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+

- Updating your App
- Logging In

- [Forgetting your Password](#)
- [The Visits List](#)
- [Changing your Password](#)
- [Changing the Time Period View on the Home Page](#)
- [Accessing Help and Support](#)

- [Viewing Active Agencies (Accounts)](#)
- [Managing your Profile](#)
- [Changing the Display Language](#)
- [Logging Out](#)
- [Checking Messages](#)

6.2.4. Accessing the Help Center

You are here: Mobile Caregiver+ > Getting Started > Accessing the Help Center

The Mobile Caregiver+ Help Center provides immediate answers to commonly asked questions and contact information for the Netsmart Client Support Team.

To access the Help Center:

i. Tap the **Main Menu** icon in the upper left-hand corner of any screen to open the Main Menu.

ii. Tap **Help Center**.
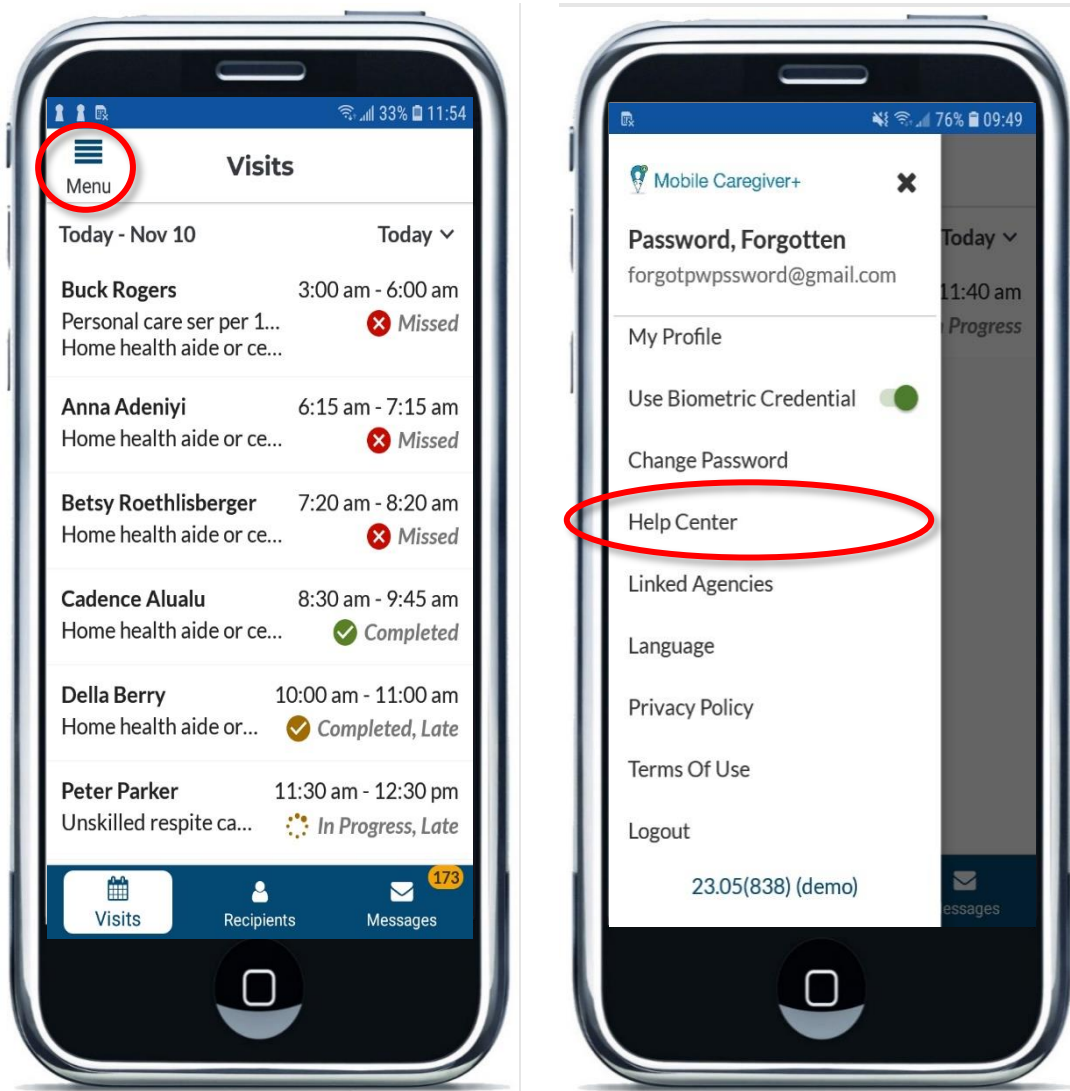
iii. Tap on the topic you need assistance with, i.e., **Location Services, Messages, Offline Mode**, etc., to view "in-app" support or tap **Contact support** to contact a Netsmart Client Support Representative.
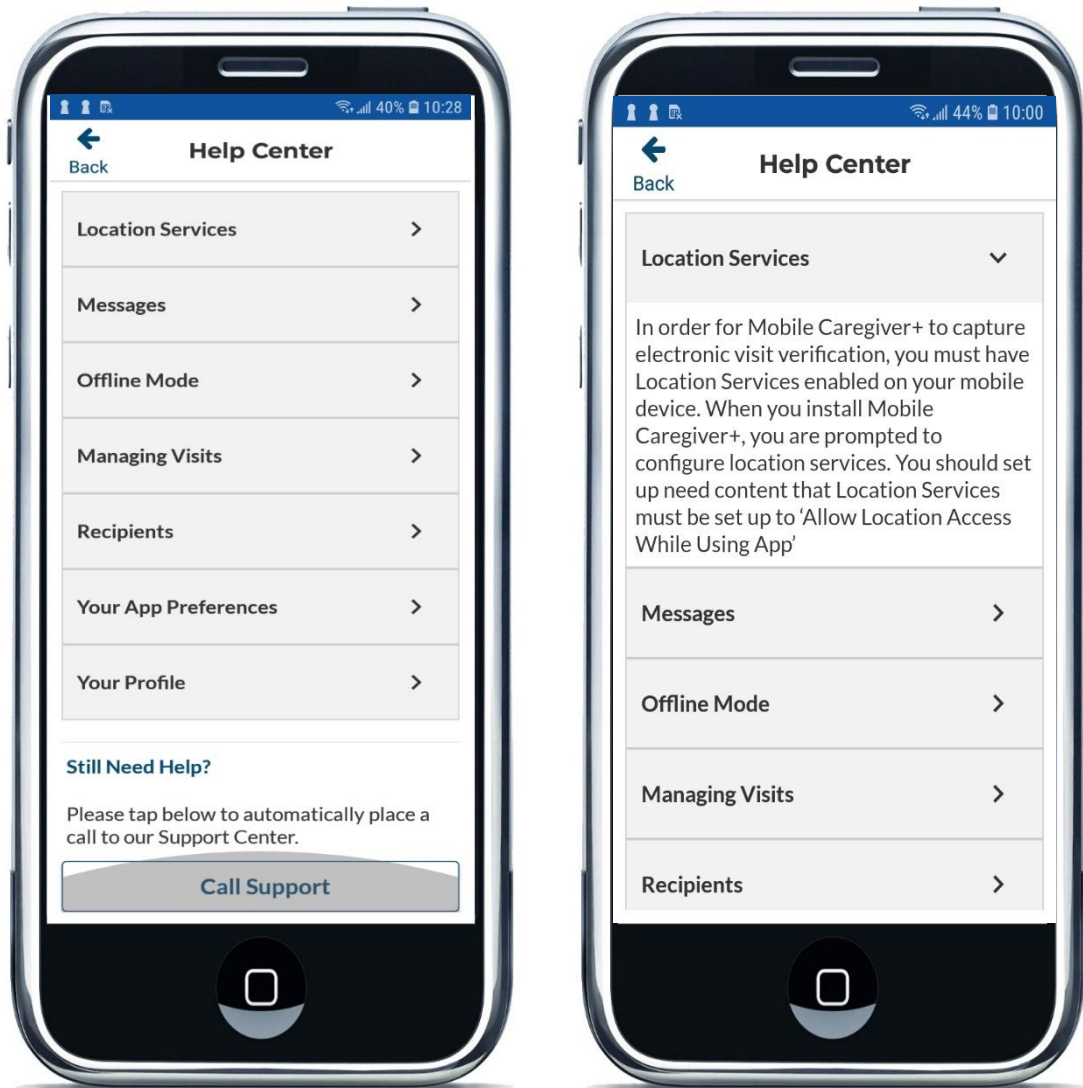
Note: In-app support provides answers to commonly asked questions.

iv.   Tap **Call Support** to contact to a Client Support Representative.

*Note: If you tap **Call Support**, you will be redirected to the phone application for your mobile device, where you can directly call the listed number if your device supports making phone calls.*
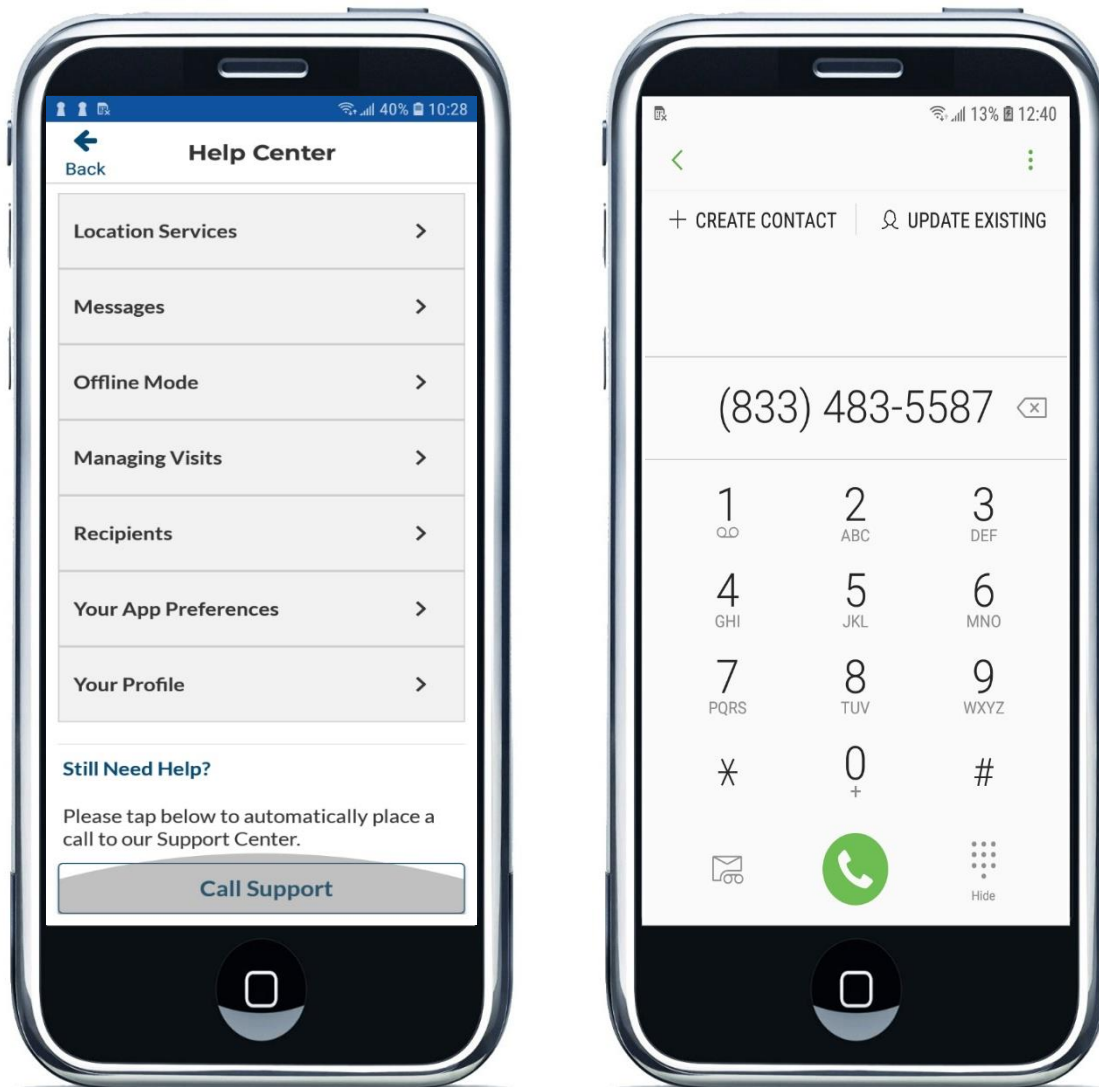
Related Topics

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)

- Managing your Profile
- Changing the Display Language
- Checking Messages
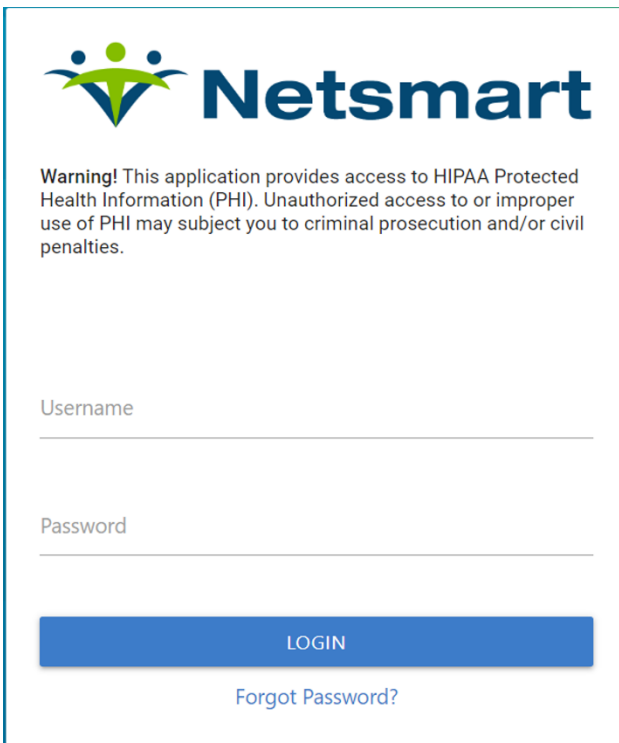
6.2.5. Accessing Netsmart Mobile Caregiver+ Online Training Resources

Netsmart provides online Mobile Caregiver+ Training Resources including user guides for Mobile Caregiver+ applications, topic-related video tutorials, full-length recorded webinars, ongoing live webinars, and client support.

Note: Online Mobile Caregiver+ user guides and full-length webinars are available in English or Spanish.

To access our online Mobile Caregiver+ Training Resources web page:

i.   Click the following hyperlink, Mobile Caregiver+ Training Resources.

ii. Enter your Mobile Caregiver+ User ID and Password.

iii. From the Training Resources web page, click on a tile to access a training resource:

- **Click User Guides** to view the online Mobile Caregiver+ user guides.
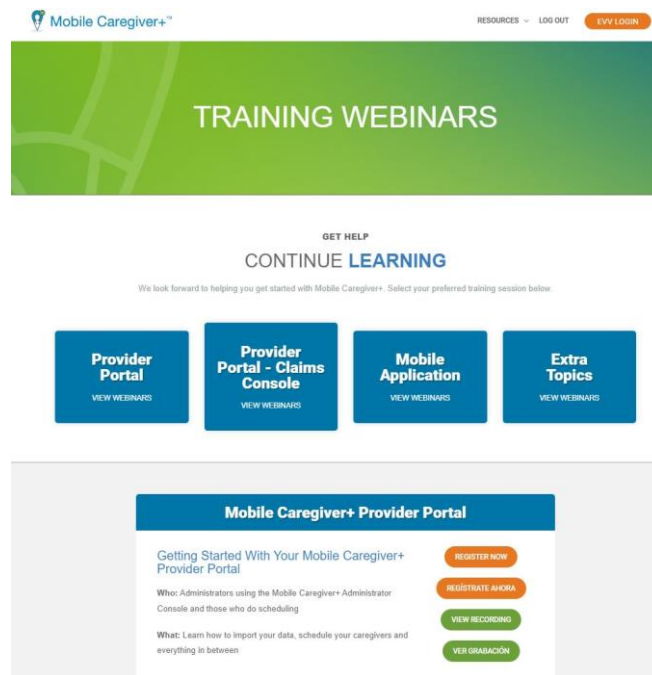
- Click **Video Tutorials** to view the online Mobile Caregiver+ topic-related video tutorials.

- Click **Training Webinars** to sign up for live-training webinars or to watch full-length recorded webinars.

6.2.6.   Viewing Linked Agencies

You are here: Mobile Caregiver+ > Getting Started > Viewing Linked Agencies

Caregivers should only have one Mobile Caregiver+ user account; a single user account can be linked to multiple agencies. The Provider Admin for each agency will "invite" Caregivers to join (link to) the agency by email. When you accept an invitation, it will appear on the **Linked Agencies** screen.

To see the list of agencies your account is linked to:

i.   Tap the **Main Menu** icon in the upper left corner of the screen.

ii.   Tap **Linked Agencies**.
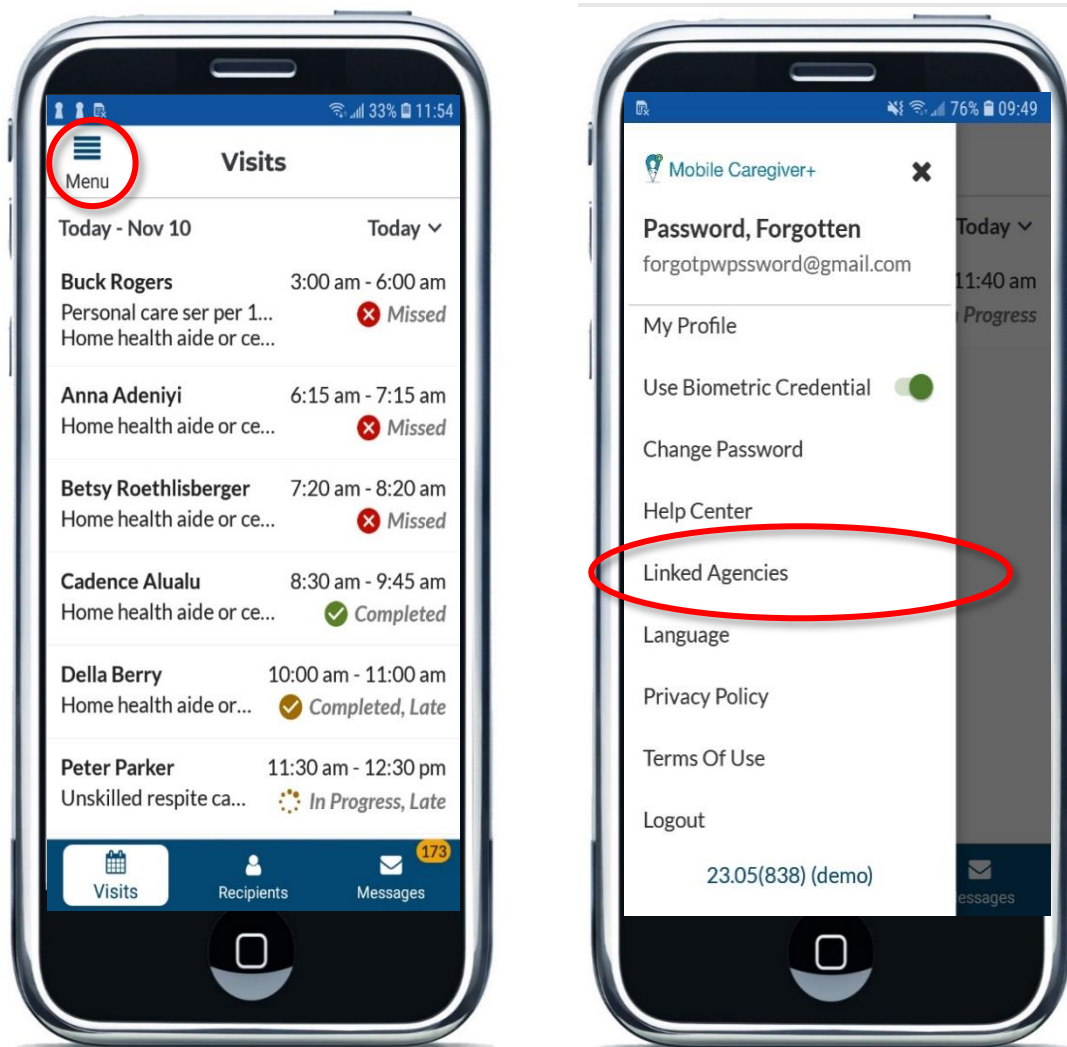
Note: The system will display all agencies and locations, that your account is currently linked to.
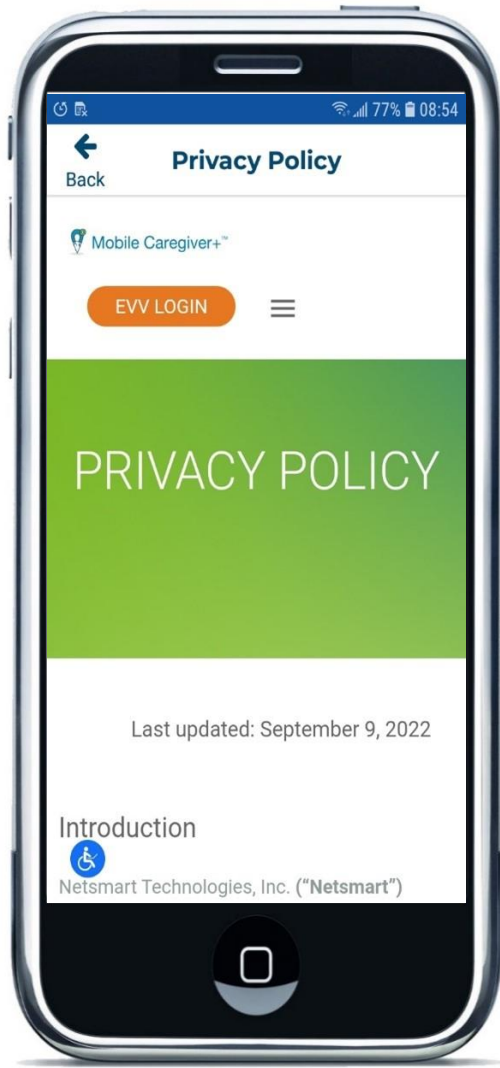
Related Topics

- Mobile Caregiver+ Overview
- Installing Mobile Caregiver+
- Updating your App
- Logging In
- Forgetting your Password
- Changing your Password

- Accessing the Main Menu
- Accessing Help and Support
- Managing your Profile
- Changing the Display Language
- Checking Messages
- Logging Out

6.2.7. Changing the Display Language

You are here: Mobile Caregiver+ Caregiver+ > Getting Started > Changing Display Language

To change the language of the of Mobile Caregiver+ Mobile Application:

i. Tap the **Main Menu** icon, ≡ , in the upper left-hand corner of the screen.

ii. Tap **Language**.
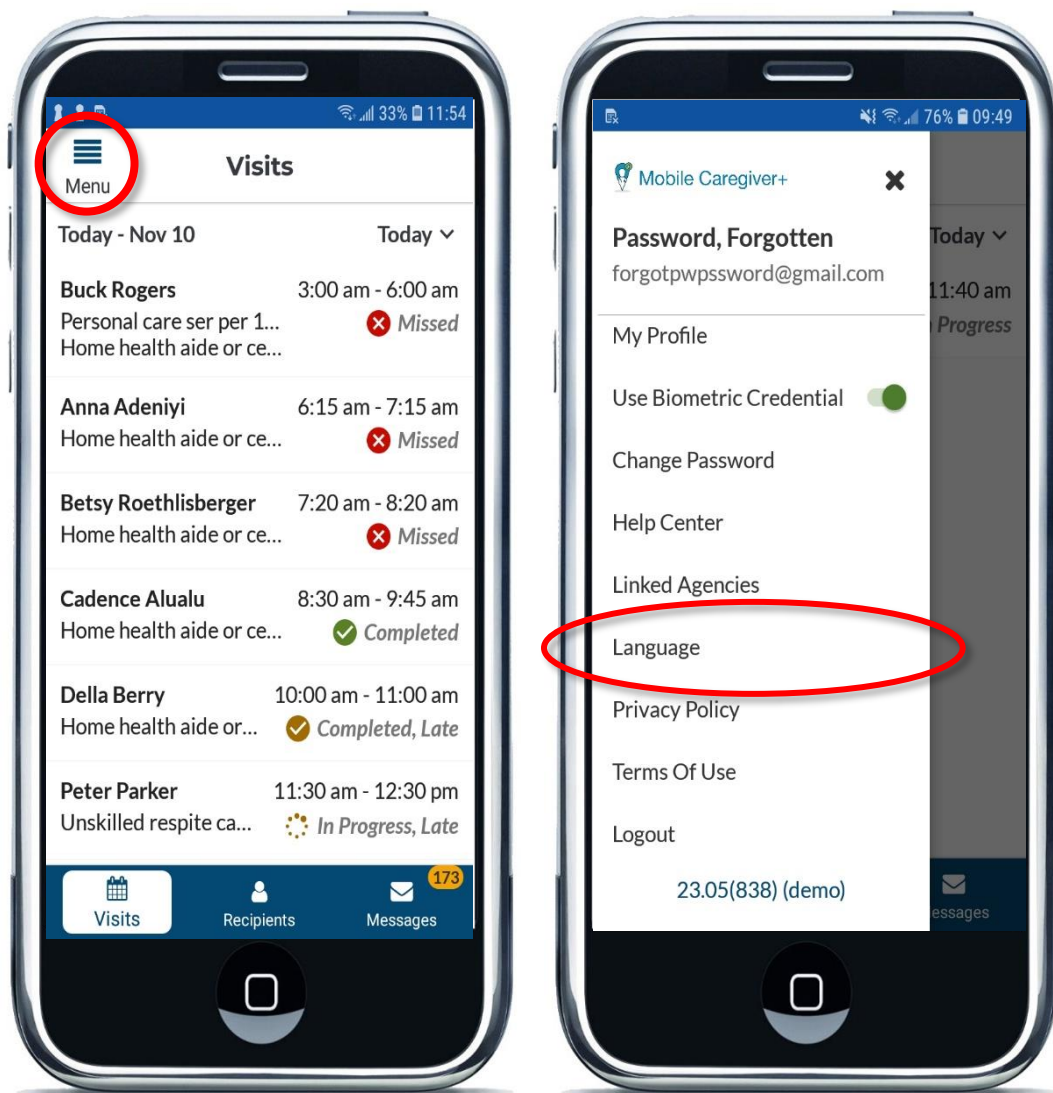
iii. Select your preferred display language for the Mobile Caregiver+ mobile application.
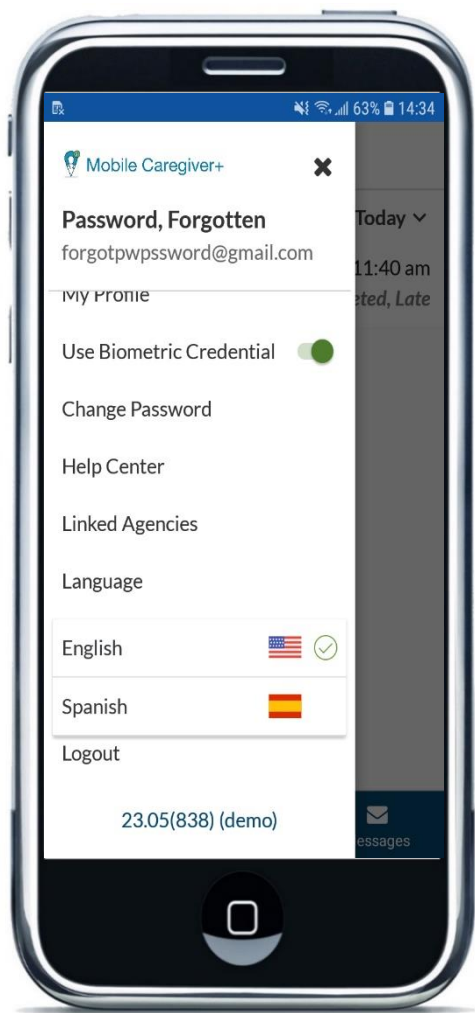
![Mobile Caregiver+ app settings menu showing Password, Forgotten account with options including My Profile, Use Biometric Credential, Change Password, Help Center, Linked Agencies, Language with English and Spanish options, and Logout]

Related Topics

- [Mobile Caregiver+ Overview](#)
- [Installing Mobile Caregiver+](#)
- [Updating your App](#)
- [Logging In](#)
- [Forgetting your Password](#)
- [The Visits List](#)
- [Changing your Password](#)

- [Accessing the Main Menu](#)
- [Accessing Help and Support](#)
- [Viewing Active Agencies (Accounts)](#)
- [Managing your Profile](#)
- [Changing the Display Language](#)
- [Logging Out](#)
- [Checking Messages](#)

6.2.8. Reviewing Netsmart's Privacy Policy

You are here: Mobile Caregiver+ Caregiver+ > Getting Started > Reviewing Netsmart's Privacy Policy

To review Netsmart's Privacy Policy:

i. Tap the **Main Menu** icon, ☰, in the upper left-hand corner of the screen.

ii. Tap **Privacy Policy**.
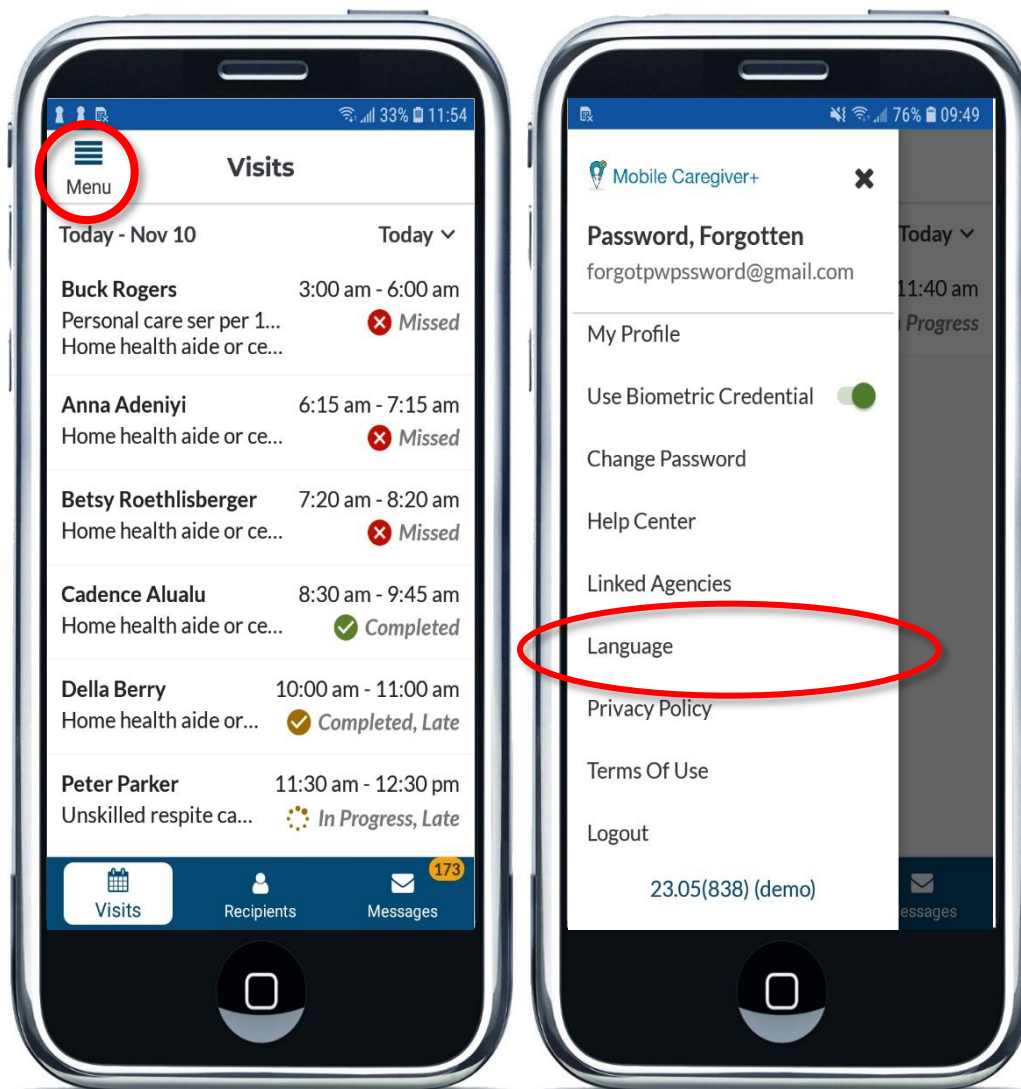
Note: You will be redirected to Netsmart's Privacy Policy page, where you can review the policies Netsmart has set in regards to collecting, using, maintaining,

protecting, and disclosing personal information shared in the Mobile Caregiver+ Software.
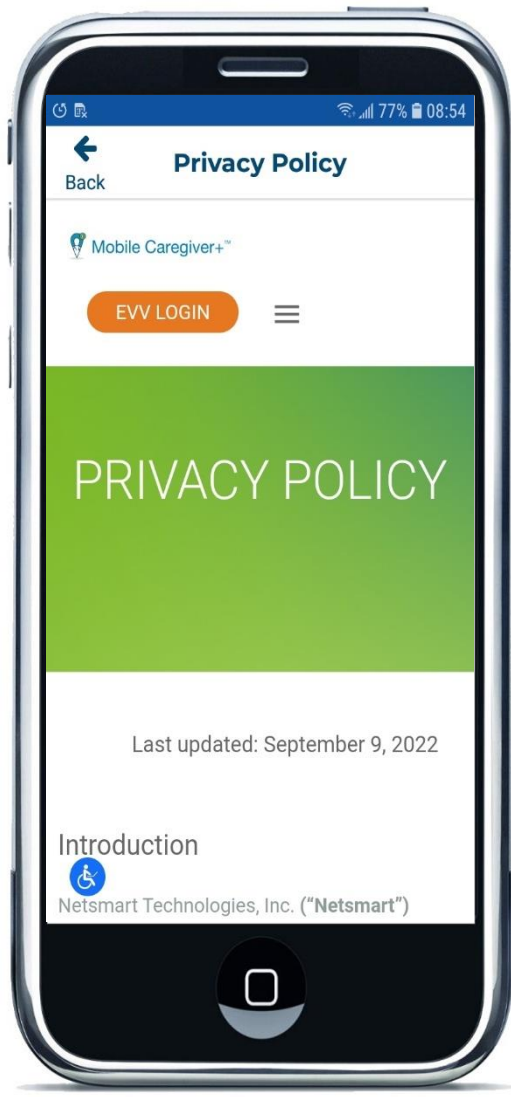
6.2.9. Reviewing Netsmart's Terms of Use Policy

You are here: Mobile Caregiver+ Caregiver+ > Getting Started > Reviewing Netsmart's Privacy Policy

To review Netsmart's Terms of Use Policy:

i. Tap the **Main Menu** icon, ☰, in the upper left-hand corner of the screen.

ii. Tap **Terms of Use**.
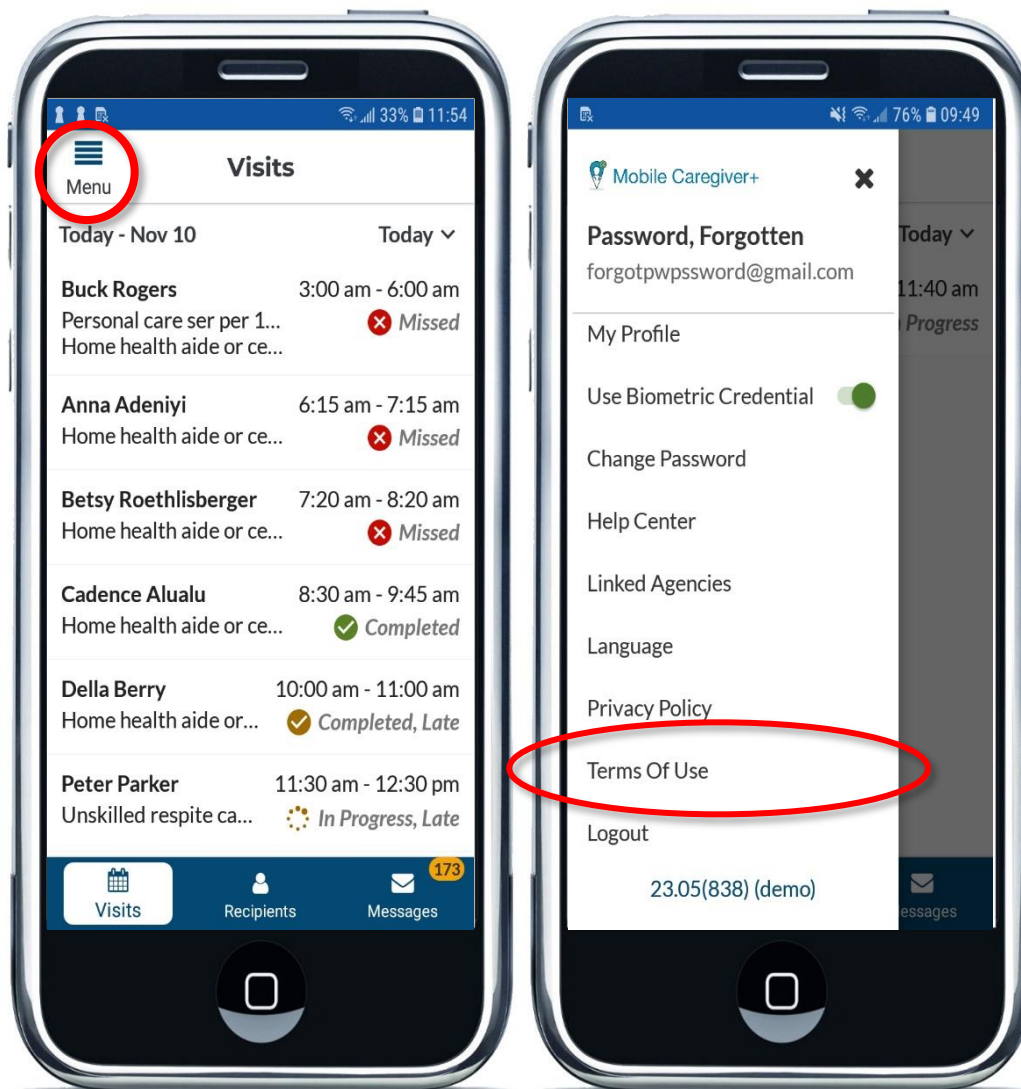
Note: You will be redirected to the Netsmart Terms of Use page.

Warning: Users cannot access the or use Netsmart's MCG+ Mobile Caregiver Application and Portal if they do not accept the Terms of Use.
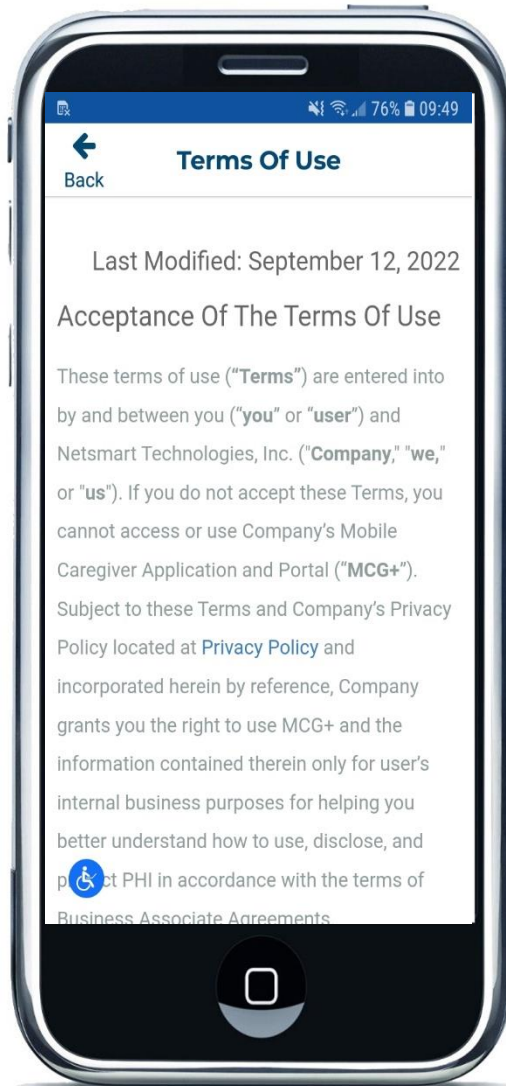
6.2.10. Logging Out of the Mobile Application

You are here: Mobile Caregiver+ Caregiver+ > Getting Started > Logging Out of the Mobile Application

To log out of the Mobile Caregiver+ Mobile Application:

i. Tap the **Main Menu** icon, ≡, in the upper left-hand corner of the screen.

ii. Tap **Logout**.

iii. You will return to the initial log-in page.
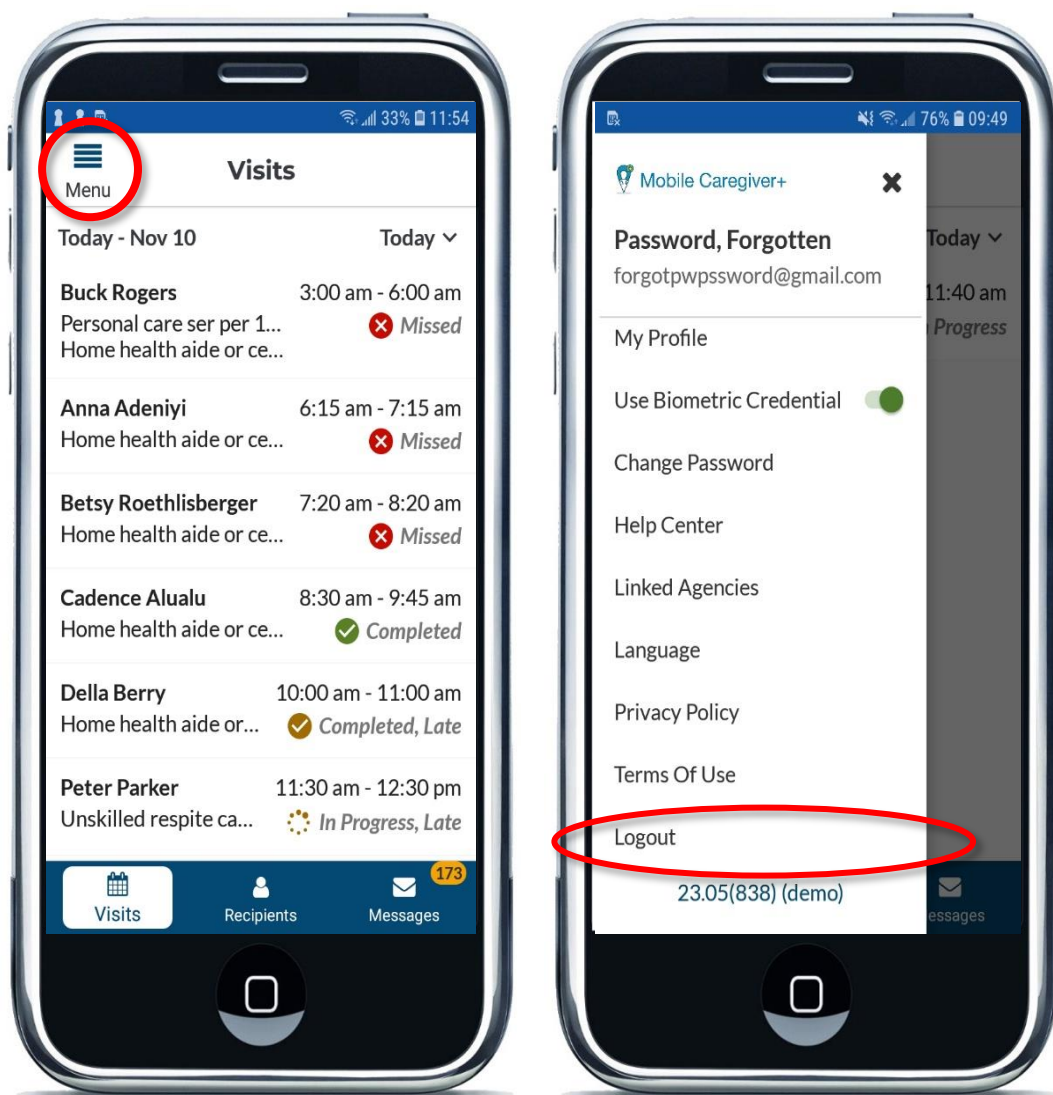
7. Managing Recipients

A Caregiver can only view PHI data for the Recipients they are assigned to work with by their Agency. In order for a Recipient to appear in a Caregiver's Recipients List, the Caregiver must first be linked to the Recipient.

Provider Admins can link a Caregiver to Recipient by:

- Scheduling the first visit for each Recipient with a Caregiver from the Provider Portal.
- Linking a Recipient to one or more Caregiver from the Linked Users tab from the Recipient Mobile Caregiver+ profile in the Provider Portal.

Click a topic below:

Viewing Recipients

Adding an Unscheduled or New Visit

Getting Directions to a Recipient's Address

Calling a Recipient or Emergency Contact

Viewing a Recipient's Documents

Viewing a Recipient's Notes

7.1. Viewing Recipients' Mobile Caregiver+ EVV Profiles

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing Recipients

To view Recipient Mobile Caregiver+ EVV profile:

1. Tap on the **Recipients** icon at the bottom of any screen.

2. Tap the name of the Recipient whose profile you want to view.
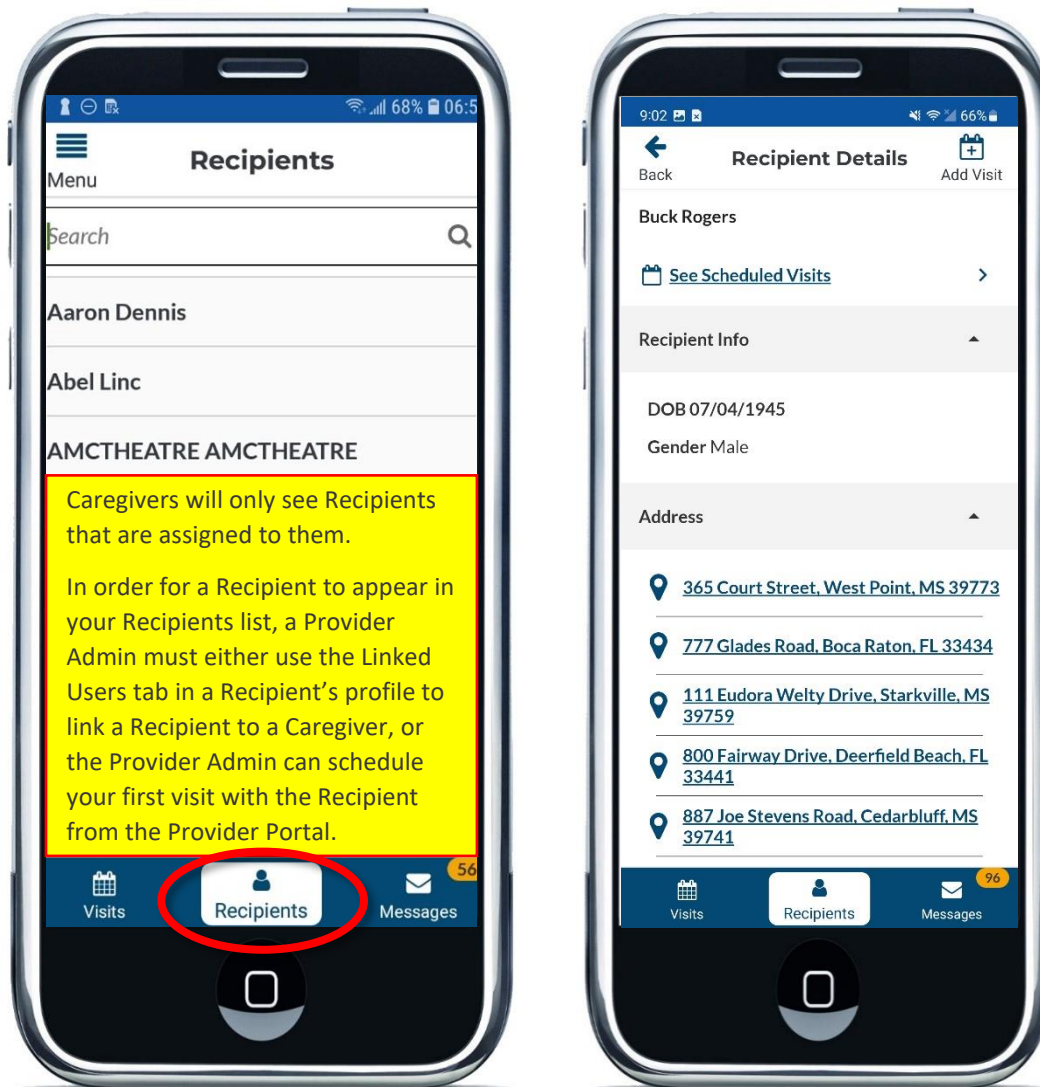
Note: Caregivers will only see Recipients that are assigned to them; for a Recipient to appear in your Recipients list, a Provider Admin must either schedule your first

visit with the Recipient from the Provider Portal or link your account to the Recipient from the Linked Users tab in the Recipient's profile.

The Recipient's Details screen contains the following controls:

- **Add Visit** – used to add, schedule, new visit for selected Recipient.
- **Scheduled Visits** – displays visits scheduled for the Recipient.
- **Recipient Info** – displays the Recipient's date of birth and gender.
- **Address(es)** – displays address(es) listed in Recipient's Mobile Caregiver+ profile. You can get step by step directions, by tapping the map pin to the left of an address, to open Google maps.
- **Phone** Number(s) – displays telephone numbers listed in Recipient's Mobile Caregiver+ profile. You can call the listed phone number, by tapping on the phone icon to the left of the Recipient phone number.
- **Emergency Contact** – displays contact listed in Recipient's Mobile Caregiver+ profile. You can call listed contact(s), by tapping on phone icon to the left of the phone number.
- **Documents** – displays document(s) that have been added to Recipient's EVV profile; you can tap on files to download and view content.

Related Topics

- Adding an Unscheduled or New Visit
- Getting Directions to a Recipient's Address
- Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile

- Calling a Recipient or Emergency Contact
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

7.1.1. Adding/Scheduling a new Visit

You are here: Mobile Caregiver+ > Preparing for a Visit > Adding/Scheduling a New Visit

Caregivers can schedule visits from Mobile Caregiver+. Caregivers must receive approval to schedule visits from Mobile Caregiver+; please check with your Provider Admin.

To schedule a visit:

i. Tap the **Recipients** icon, located at the bottom of the screen.

ii. Tap on the record for Recipient you want to schedule the visit for.

iii. Tap the **Add Visit**, ⊞ Add Visit, command to open the Add New Visit screen.
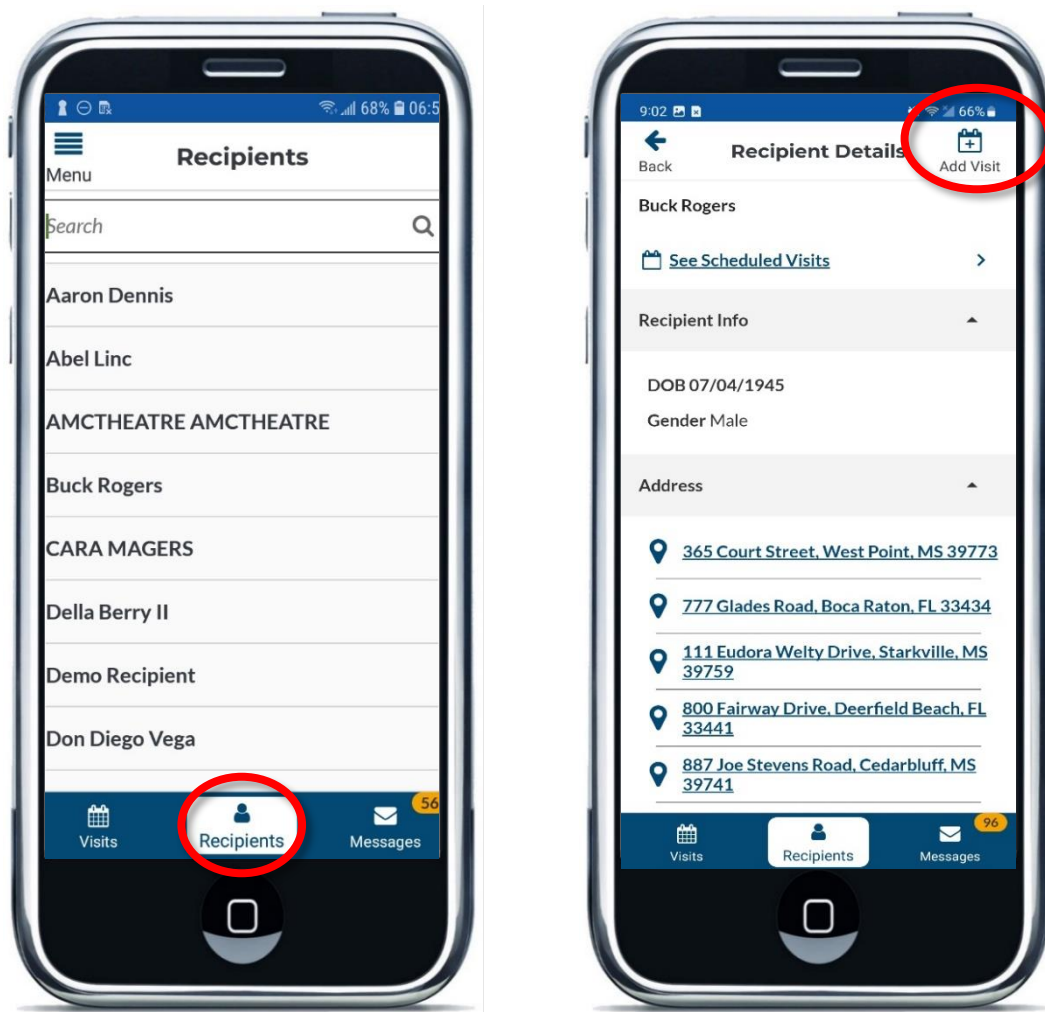
iv. For Recipients that are enrolled with multiple agencies, click in the **Organization** field and select the agency that the visit is being scheduled for.

v.   If the visit is being scheduled for multiple Recipients, tap **Add Recipient** to add additional Recipients.
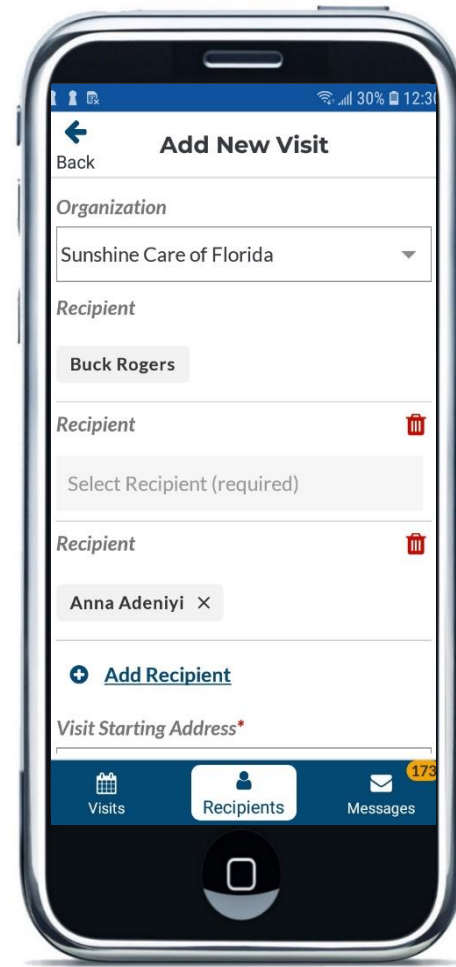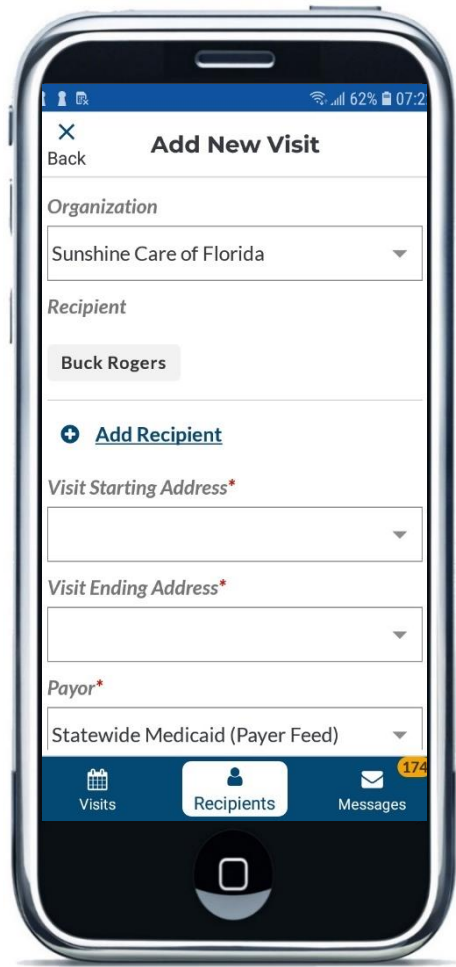
vi.   Tap in the **Visit Starting Address** field and select the address where the service will start.

vii.   Tap in the **Visit Ending Address** field and select the address where the service will end.

viii. If the Recipient(s) are enrolled with multiple Payers Programs/Plans, tap in the **Payer** field to select a Payer Plan/Program.
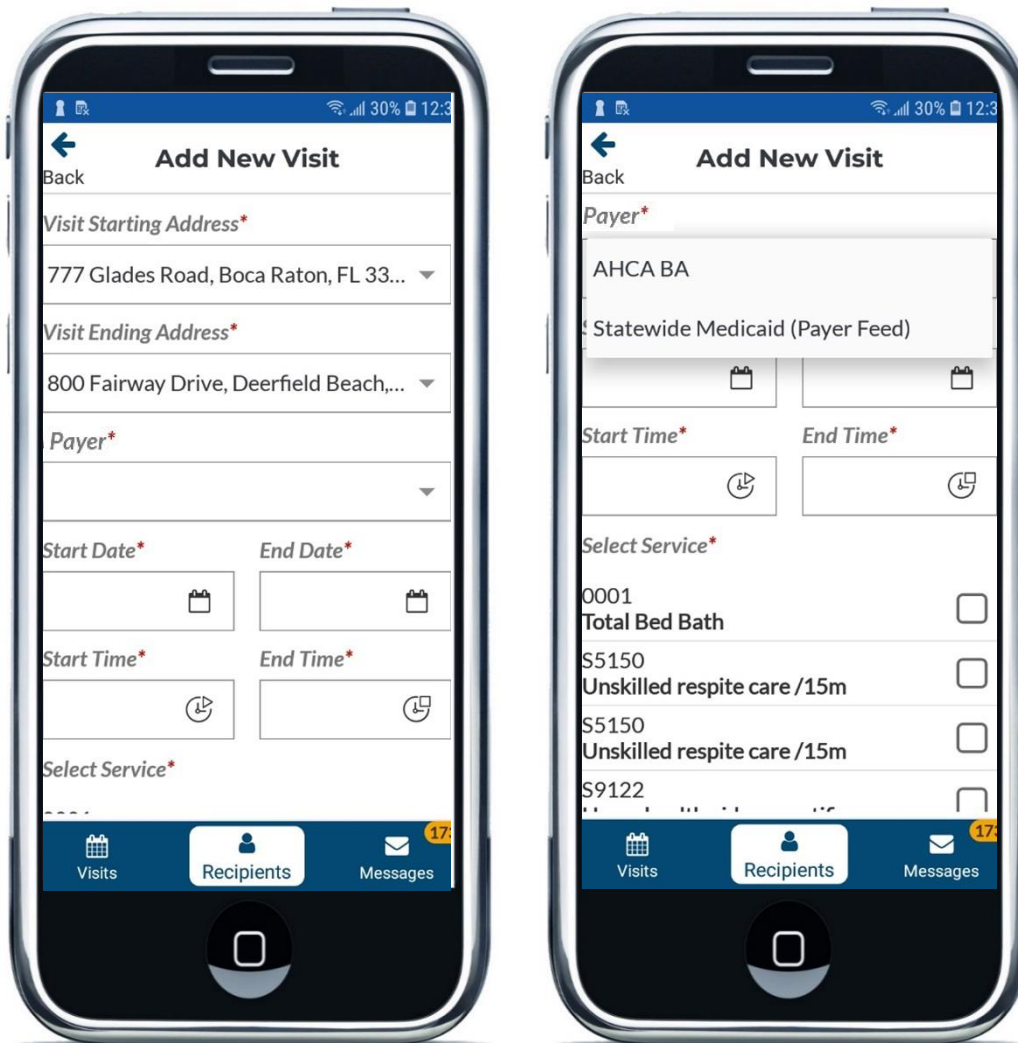
ix. Touch the calendar icon, 📅, located in the Start Date field to select the date the visit will occur.

x. Tap the clock icon, 🕑, located in the Start Time field to select the time the visit will start.

xi. Tap the calendar icon, 📅, located in the End Date field to select the date the visit will end.

xii. Tap the clock icon, 🕑, located in the End Time field to select the time the visit will end.
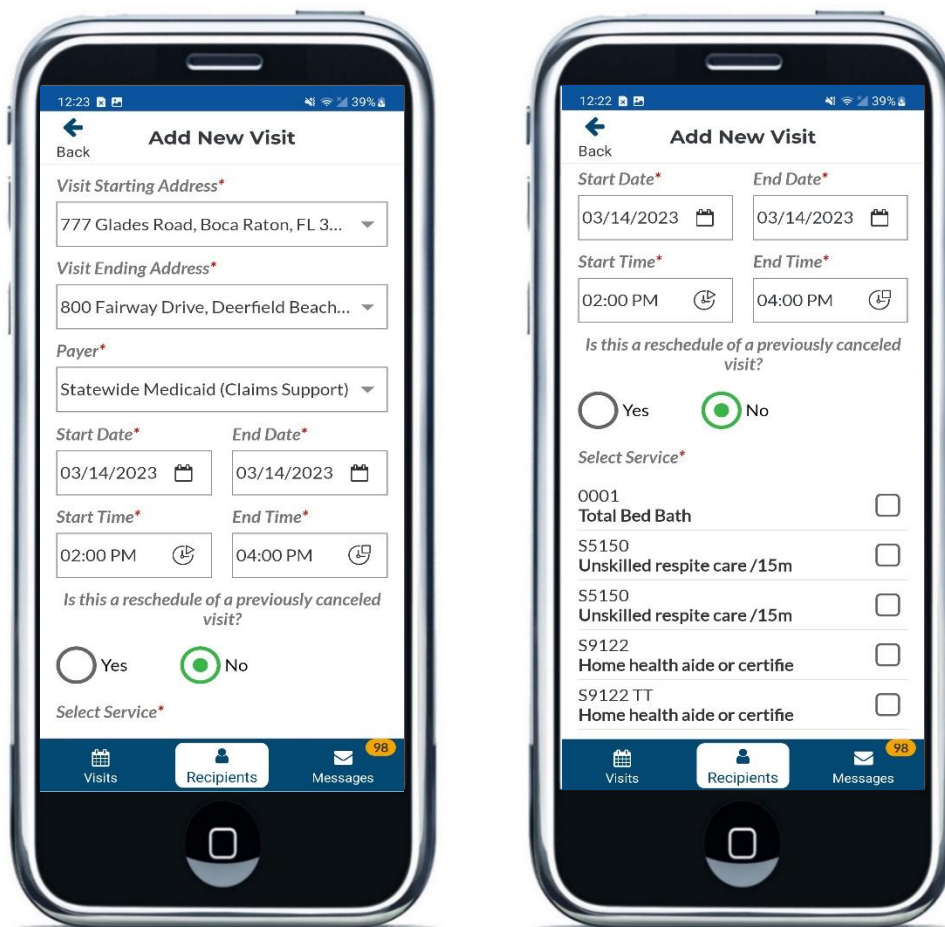
xiii. If the visit being created was previously canceled, select **Yes** or **No**.

xiv. Place a checkmark in the checkbox for each service that is being assigned. Be sure to select the Procedure Code and Modifier combination that matches the Procedure Code and Modifiers listed the Recipient's Prior Authorization.

xv. Uncheck any Tasks that are not being assigned.

xvi. Scroll to the bottom of the form and tap the blue **Save** command, to add the visit to your schedule.

xvii. The system will display a confirmation dialog box, indicating that the visit was successfully created.
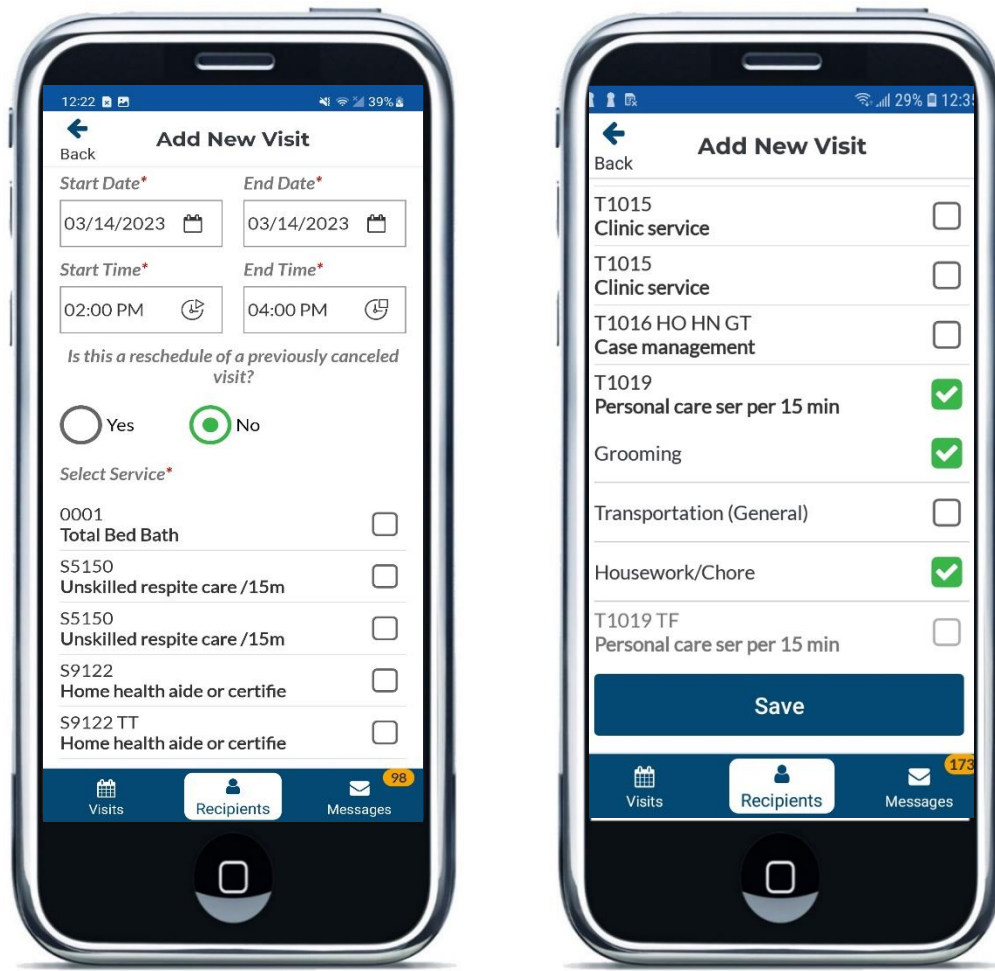
Note: All scheduled visits will be displayed in the Visits List.

7.1.2. Viewing a Recipient's Scheduled Visits

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing Recipient's Scheduled Visits

Caregivers can review a Recipient's scheduled visit from his/her Mobile Caregiver+ profile.

To view a Recipient's scheduled visits:

i.   Tap the **Recipients** icon, located at the bottom of the screen.

ii.   Tap on the record for Recipient whose scheduled visits you want to review.

iii. Tap on the **See Scheduled Visits** link to view a filtered list of visits that have been scheduled for the selected Recipient in the Visits list.
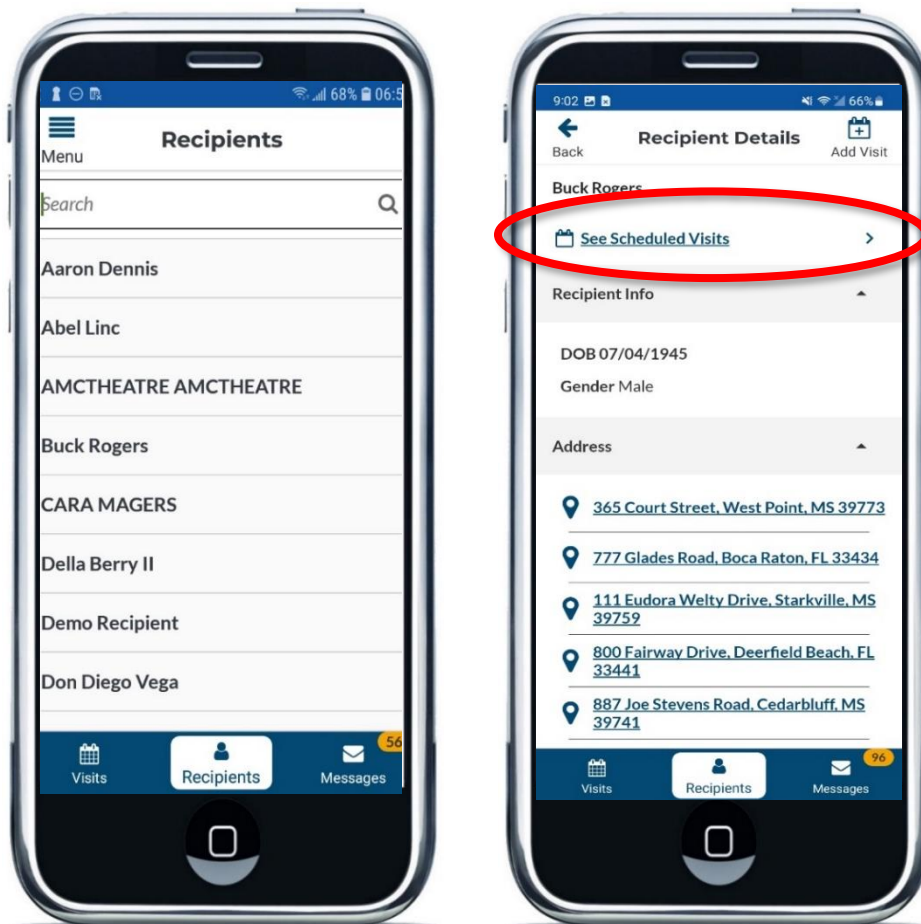
*Note: Caregivers can tap on the **Note** icon,* *, to view historical notes that have been added to the Recipient's Mobile Caregiver+ EVV profile.*
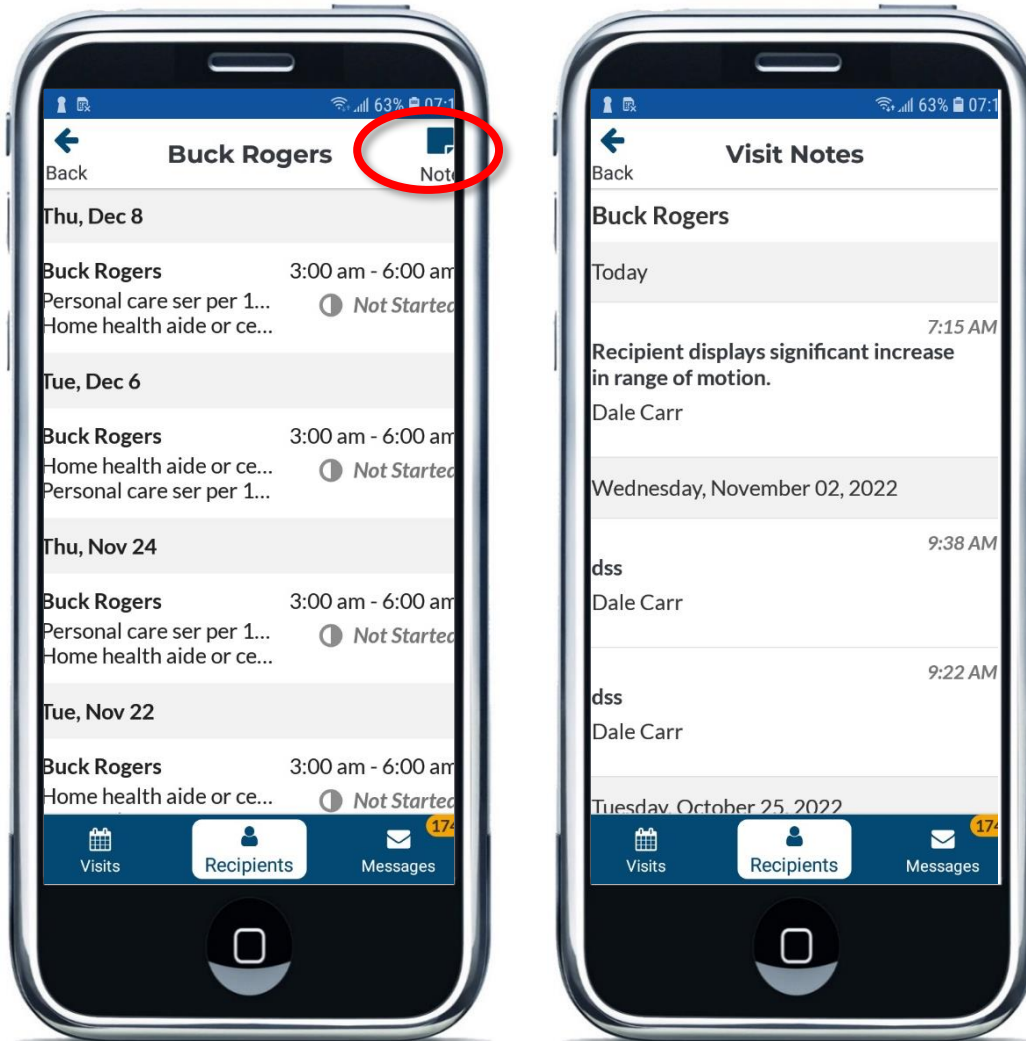
7.1.3. Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile

To review historical notes that have been added to a Recipient's Mobile Caregiver+ EVV record:

i. Tap the **Recipients** icon, located at the bottom of the screen.

ii. Tap on the record for Recipient historical notes you want to view.

iii. Tap the **See Scheduled Visits** link to open the Visits List. The system will display a filtered list of scheduled visits for the selected Recipient.
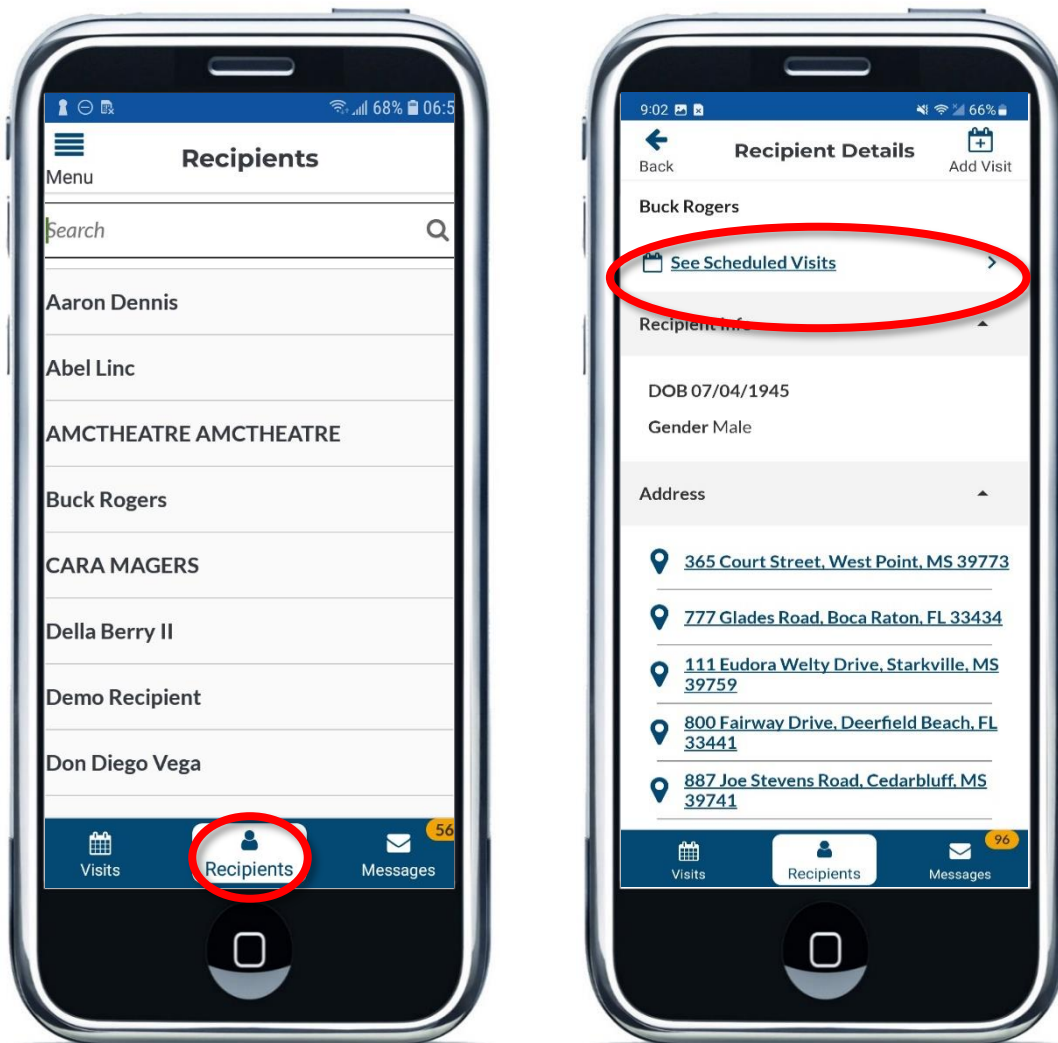
iv. Tap on the **Note** icon, , to view historical notes that have been added to the Recipient's Mobile Caregiver+ EVV record.
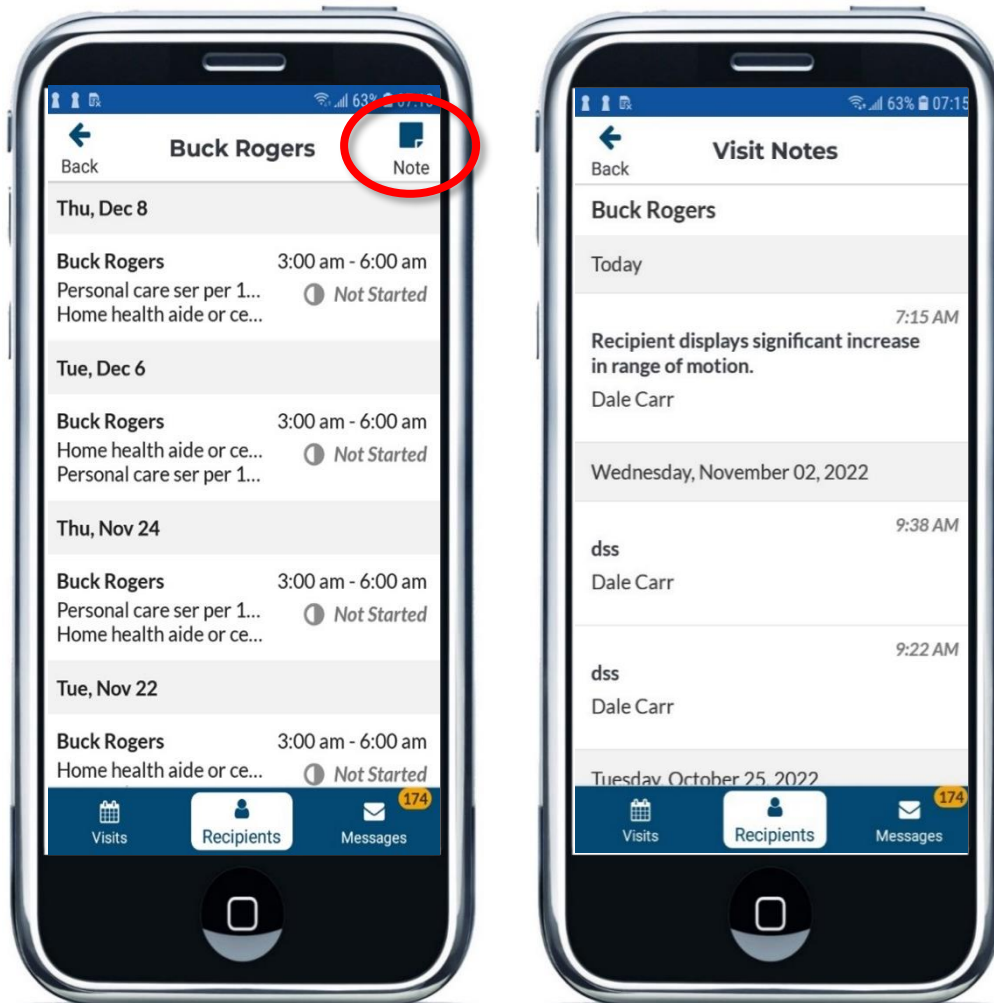
Related Topics

- Adding an Unscheduled or New Visit
- Getting Directions to a Recipient's Address
- Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile

- Calling a Recipient or Emergency Contact
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

7.1.4. Getting Directions to a Recipient's Address

You are here: Mobile Caregiver+ > Preparing for a Visit > Getting Directions to a Recipient's Address

To see all addresses on file for a particular Recipient and to receive directions to a location:

    i.   Tap the **Recipient** icon, located at the bottom of the screen.

    ii.   Tap on the record for the Recipient you want to select.
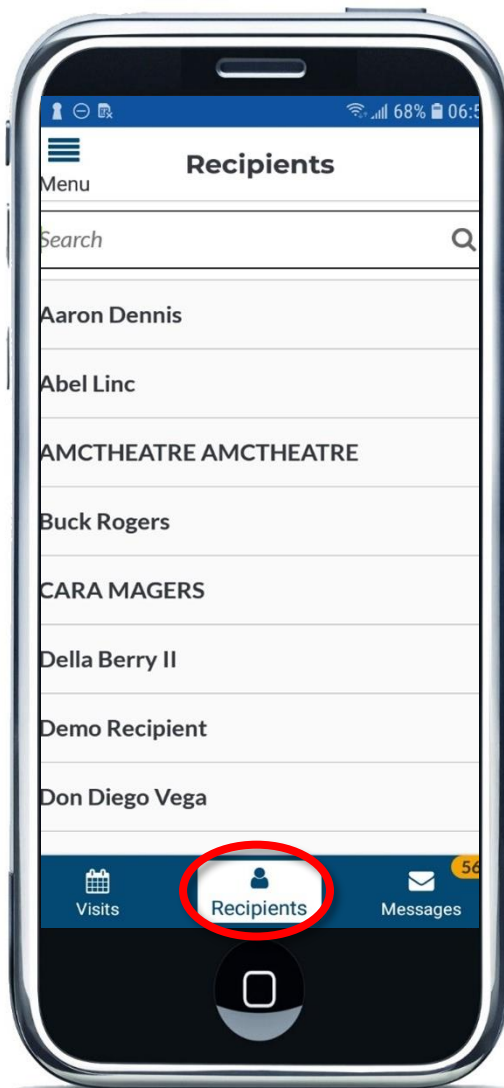
iii.   Tap on the map pin for the address to open Google Maps to get directions.
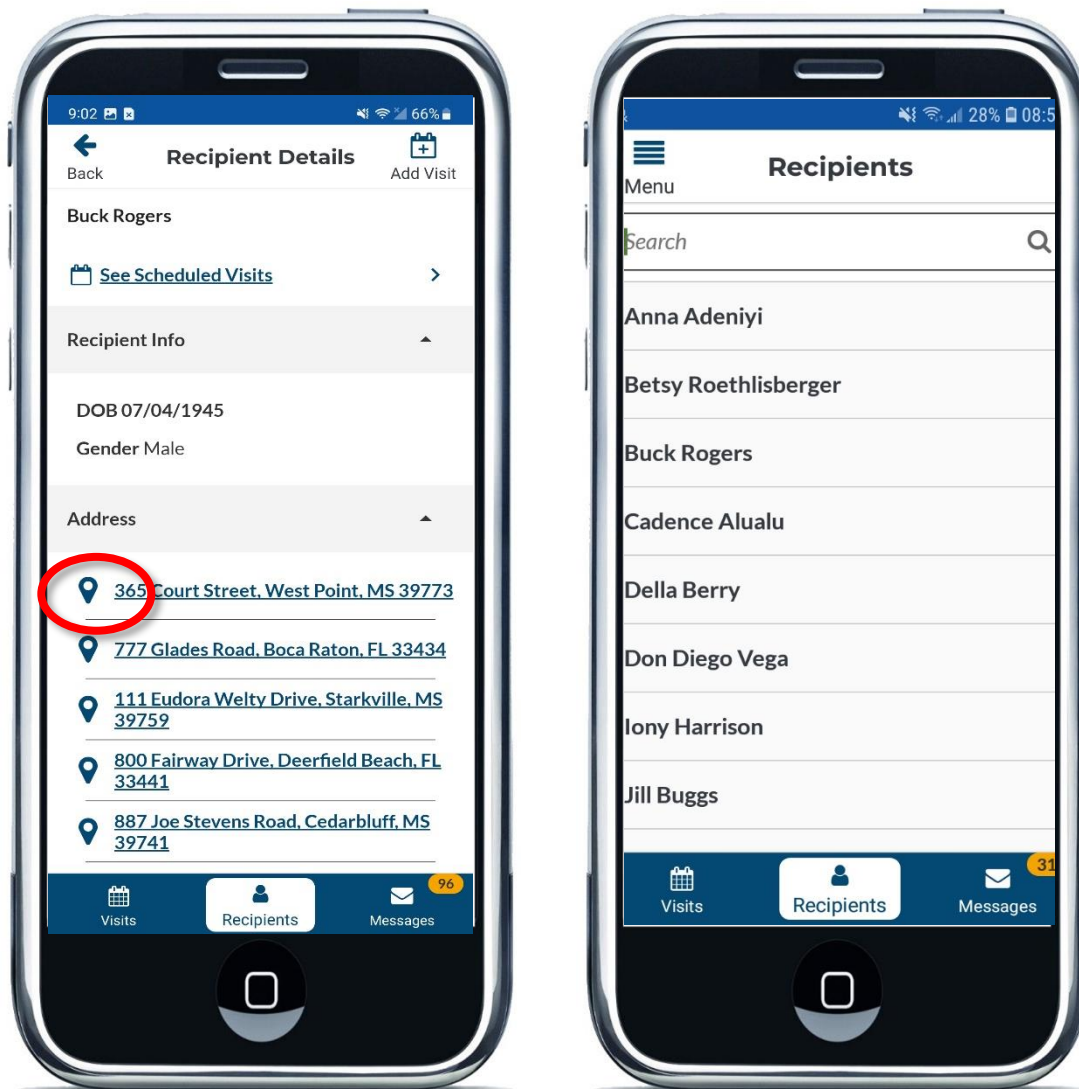
Related Topics

- Viewing Recipients
- Adding an Unscheduled or New Visit
- Calling a Recipient or Emergency Contact

- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

7.1.5. Calling a Recipient or Emergency Contact

You are here: Mobile Caregiver+ > Preparing for a Visit > Calling a Recipient or Emergency Contact

To call a Recipient or Emergency Contact:

i.   Tap on the **Recipients** icon at the bottom of any screen.

ii. Tap on the record for the Recipient you want to call.
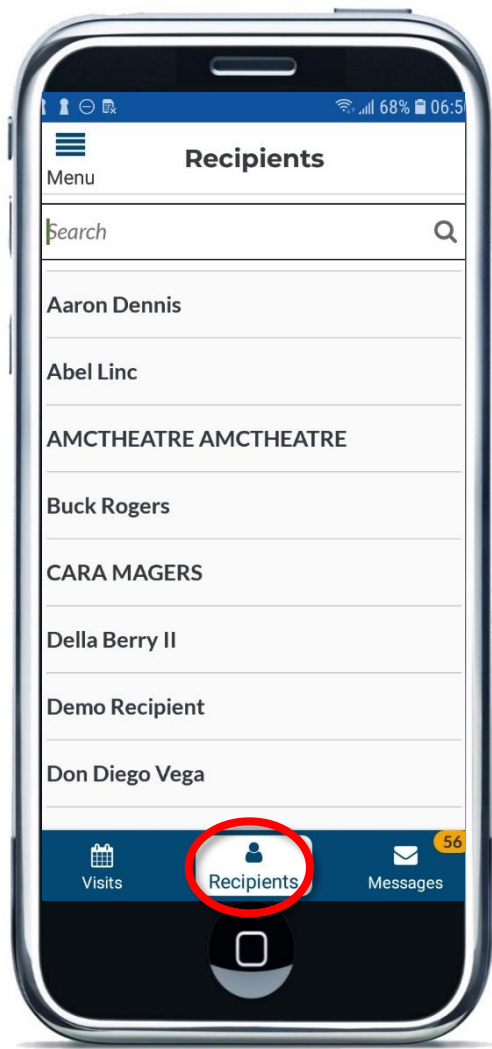
iii. Tap the phone icon next to the Recipient or Emergency Contact to open the calling feature on your device.

iv. The number is pre-populated; place the call as you would normally.
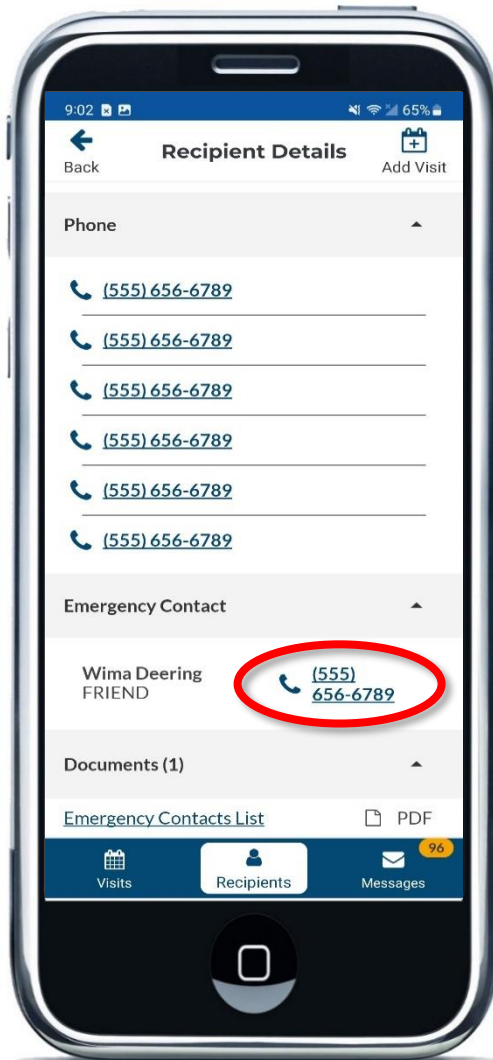
Related Topics

- Viewing Recipients
- Adding an Unscheduled or New Visit

- Getting Directions to a Recipient's Address
- Viewing a Recipient's Documents
- Viewing a Recipient's Notes

7.1.6. Viewing Uploaded Documents in a Recipient's EVV Profile

You are here: Mobile Caregiver+ > Preparing for a Visit > Viewing Uploaded Documents in a Recipient's EVV Profile

Your Provider Admin may have scanned and uploaded documents, such as progress notes, to a Recipient's Mobile Caregiver+ EVV profile.

To view Recipient documents:

i. Tap on the **Recipients** icon at the bottom of any screen.

ii. Tap on the record for the Recipient you want to select.
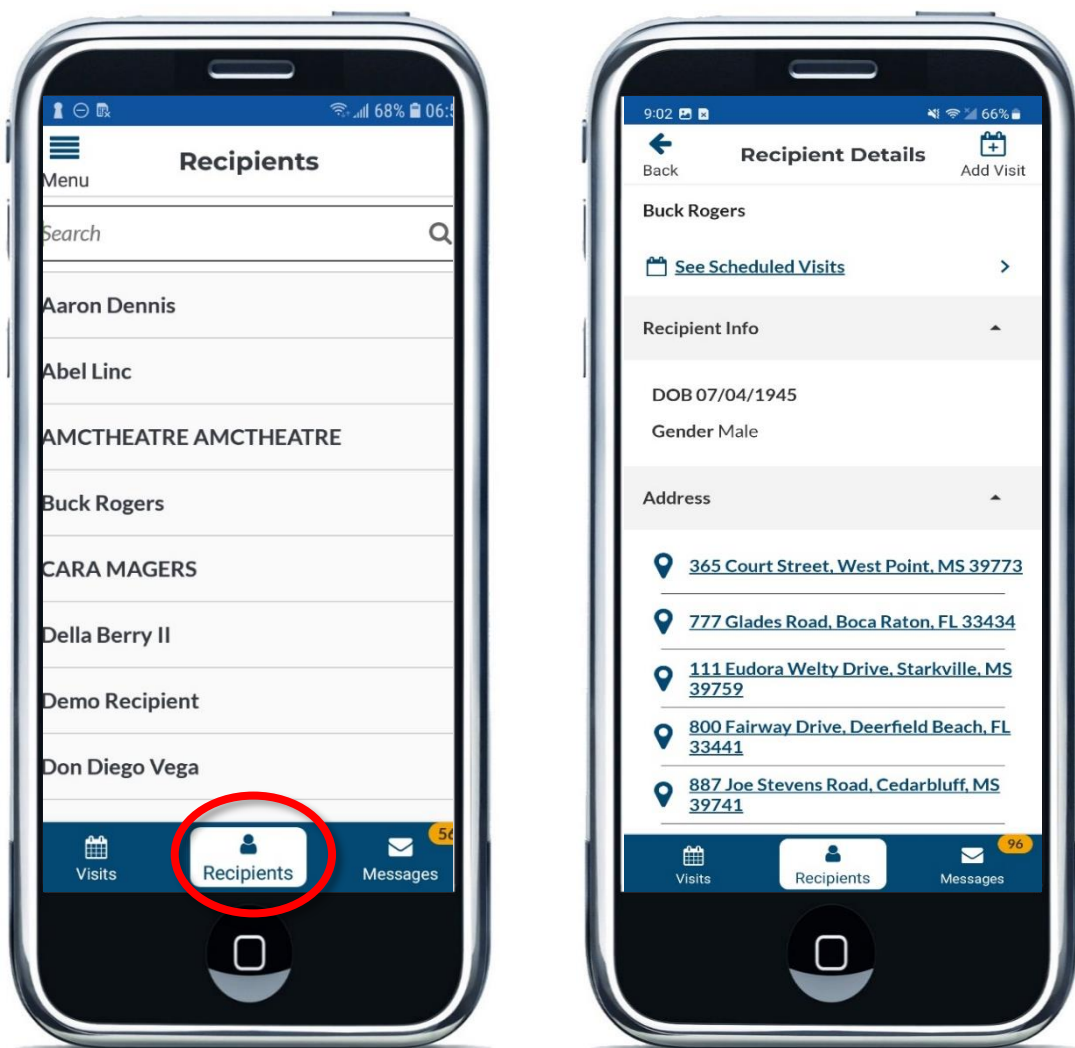
iii. Scroll to the bottom of the screen to see available documents.

iv.   Tap on a file to download and view the content.

The system will display any documents that have been added to the Recipient's Mobile Caregiver+ profile.

Note: Documents are in .pdf format and are for viewing only.
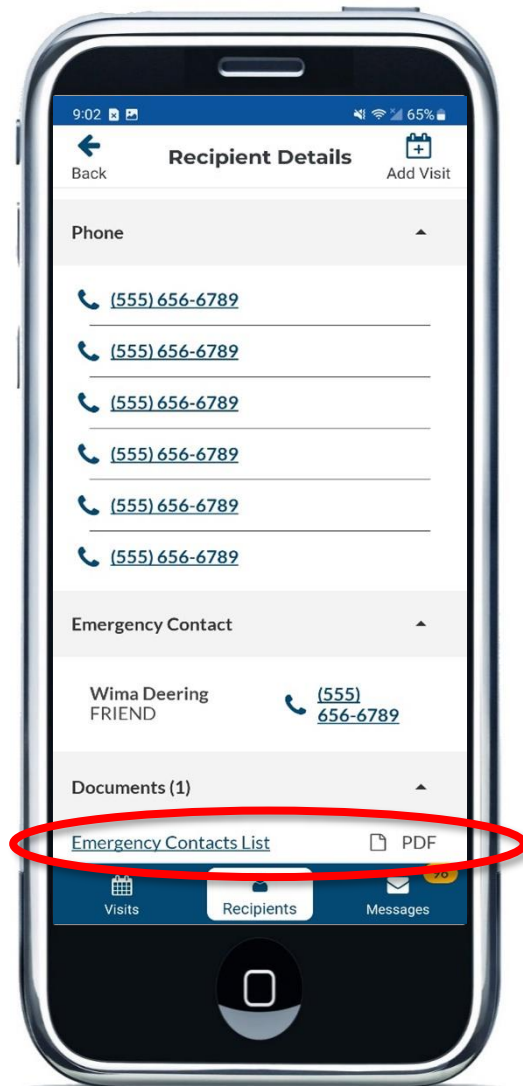
Related Topics

- Viewing Recipients

- Adding an Unscheduled or New Visit

- [Getting Directions to a Recipient's Address](#)
- [Calling a Recipient or Emergency Contact](#)
- [Viewing a Recipient's Notes](#)

8. Managing Messages

You are here: [Mobile Caregiver+](#) > [Getting Started](#) > Managing Messages

The Mobile Caregiver+ mobile app allows Provider Admins to send HIPAA compliant text message to Caregivers, which they can be read using the mobile app; the solution also allows Caregiver to add Visit notes to Recipients' Mobile Caregiver+ EVV profiles.

Caregivers have the option to send Visit notes directly to their Provider Admins' Inboxes in the Provider Portal as Alerts.

8.1. Viewing Messages

To view alerts that have been sent to, and HIPAA compliant messages that have been sent from, the Mobile Caregiver+ Provider Portal:

1. Tap the **Messages** icon, [icon], at the bottom of the screen to display your messages.

2. Tap a message to open it.
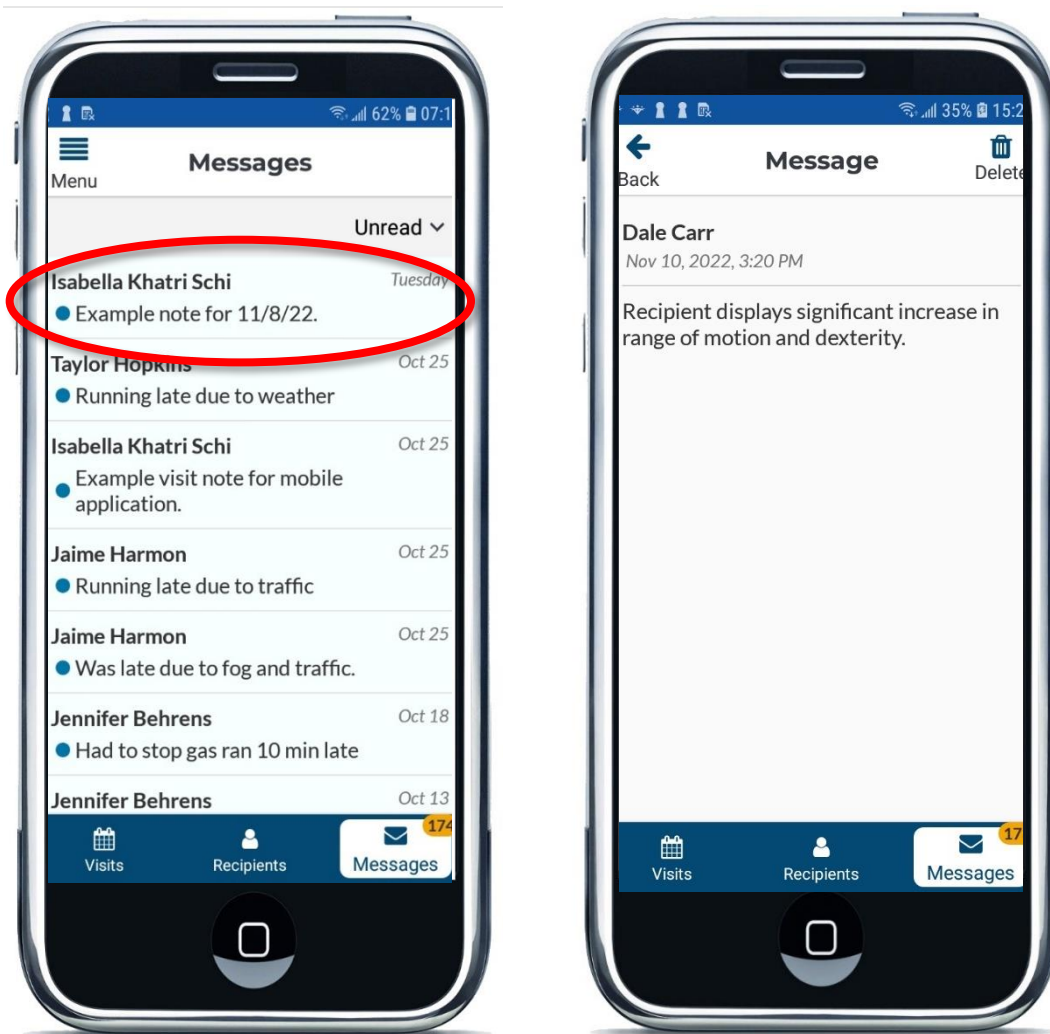
8.1.1. Filtering Messages

You are here: Mobile Caregiver+ > Getting Started > Checking Messages > Filtering Messages

To filter messages in the Inbox:

    i.   Tap the **Messages** icon, ⌧, at the bottom of the screen to display your messages.

    ii.   Tap the drop-down list arrow in the upper right corner and select a filter option from the dropdown list. The Messages List can be filtered to display only **Unread**, **Read**, or both types of messages.
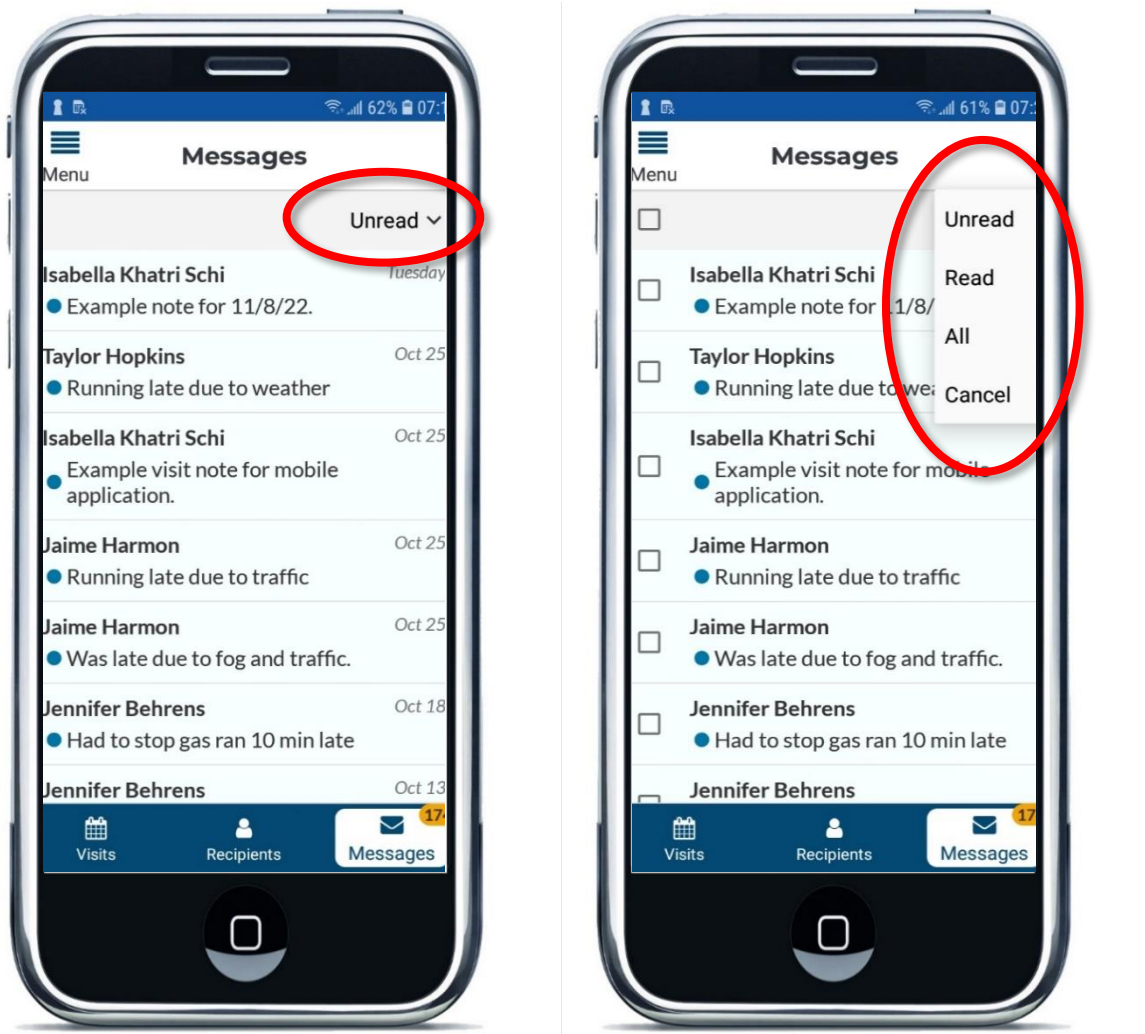
8.2. Deleting a Message

You are here: Mobile Caregiver+ > Getting Started > Checking Messages > Deleting a Message

To delete a message:

1. Tap the **Messages** icon, at the bottom of the screen.

2. Tap the message you wish to delete.

3. Tap on the trash can icon in the upper right corner to delete the message.
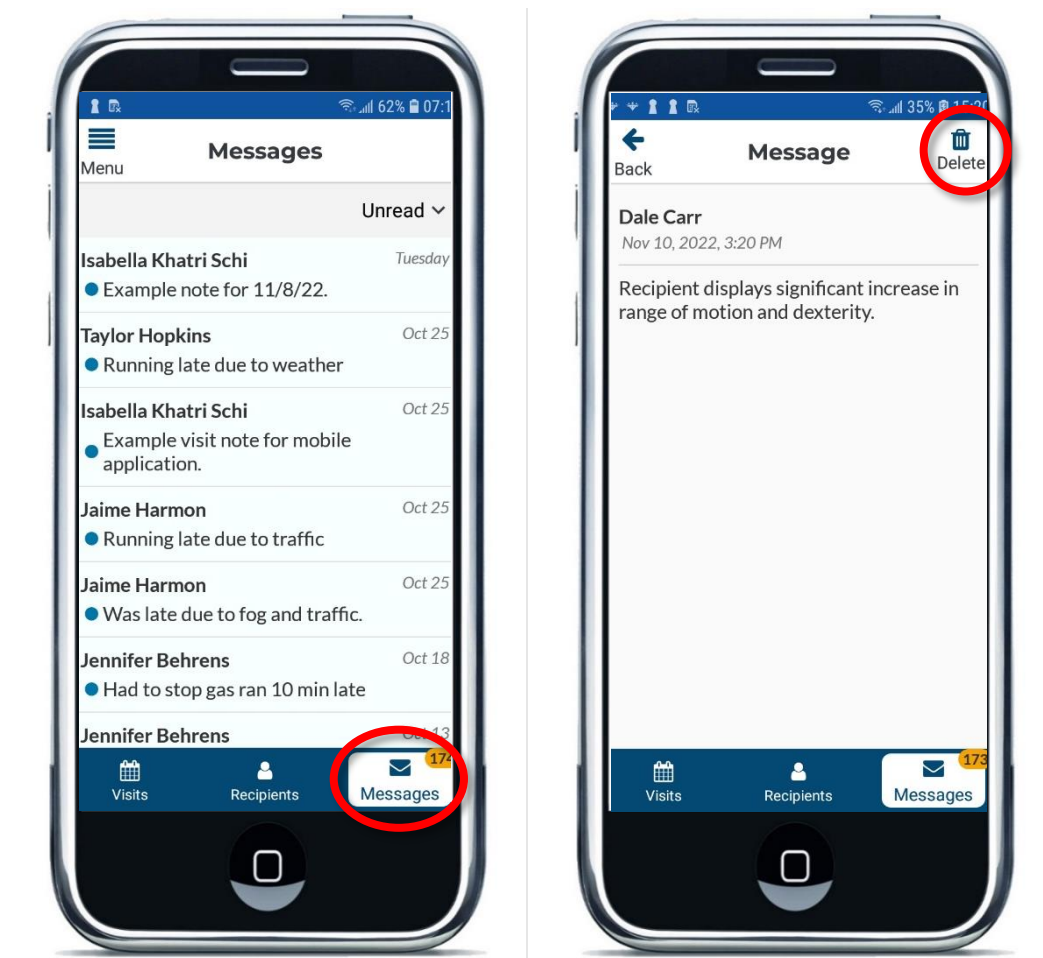
4. Tap **Delete** to confirm that you want to delete the current message.
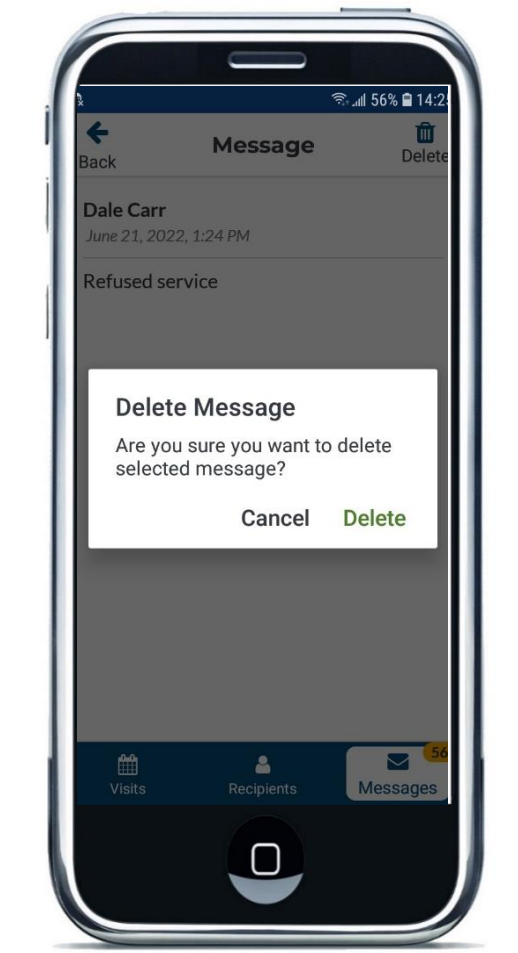
8.3. Deleting Multiple Messages

To delete multiple messages:

1. Tap the **Messages** icon, at the bottom of the screen.

2. Tap and hold on any message, until the system displays a checkbox next to each message.

3. Place a checkmark in the checkbox(es) next to the message(s) you want to delete – or place a checkmark in the checkbox located in the top left corner of the screen, next to the trash icon, to select all messages.

4. Tap on the trash can icon, 🗑, in the upper left corner to delete the selected message(s).
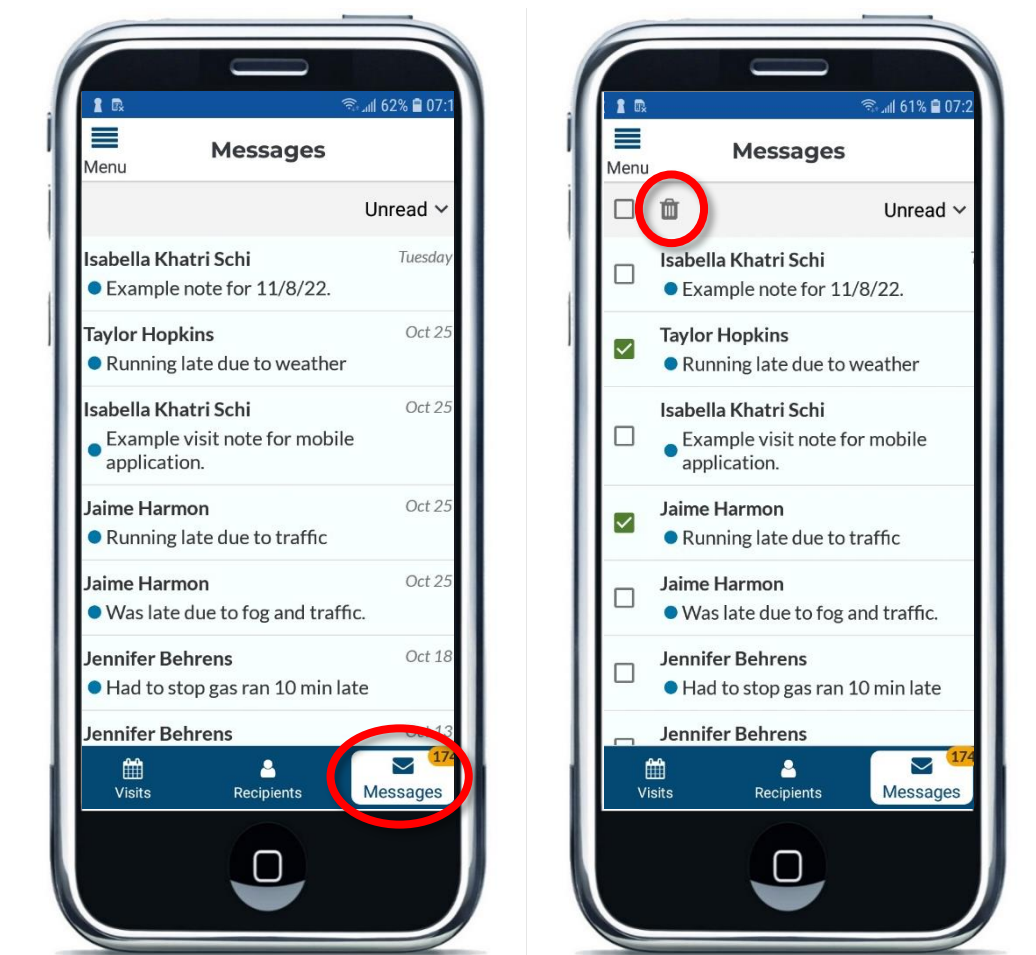
5. Tap **Delete** to confirm that you want to delete the selected messages .
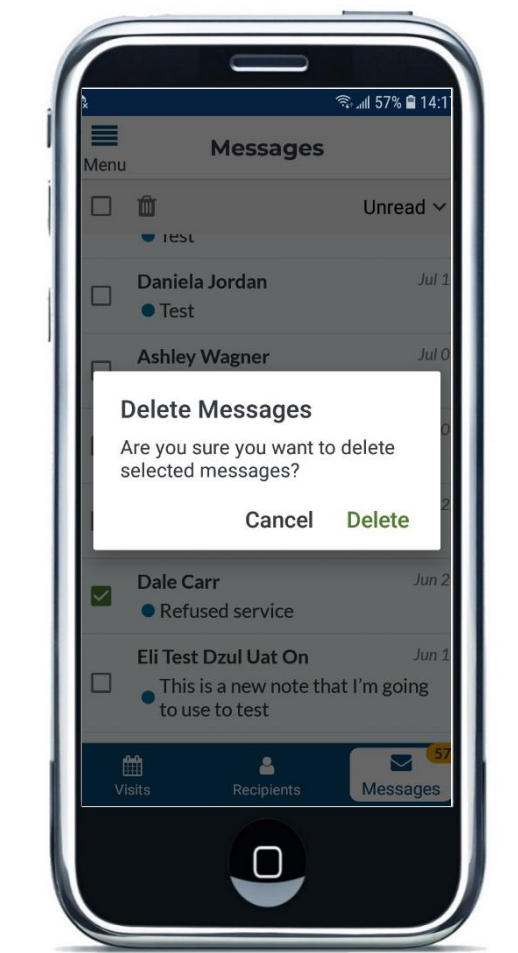
Related Topics

- Installing Mobile Caregiver+
- Updating your App
- Logging In
- Forgetting your Password
- Changing your Password
- Accessing the Main Menu

- Changing the Time Period View on the Home Page
- Accessing Help and Support
- Viewing Active Agencies (Accounts)
- Managing your Profile
- Checking Messages
- Logging Out

9. Managing Scheduled Visits

Click on a topic below:

Completing a Scheduled Visit

Completing a Visit When you are Offline

Adding Notes and Sending Alerts

9.1. Completing a Scheduled Visit

You are here: Mobile Caregiver+ > Managing Visits > Completing a Scheduled Visit

The Mobile Caregiver+ mobile application is Netsmart's EVV Solution which allows caregivers to view their scheduled visits and to record details for services and tasks completed in visits.

To start a visit:

1. From the Visits List, tap on a scheduled visit to start recording service activity.

2. Tap **Start Visit** to start the service – the current time will be recorded as the **Actual Start Time** of the service.
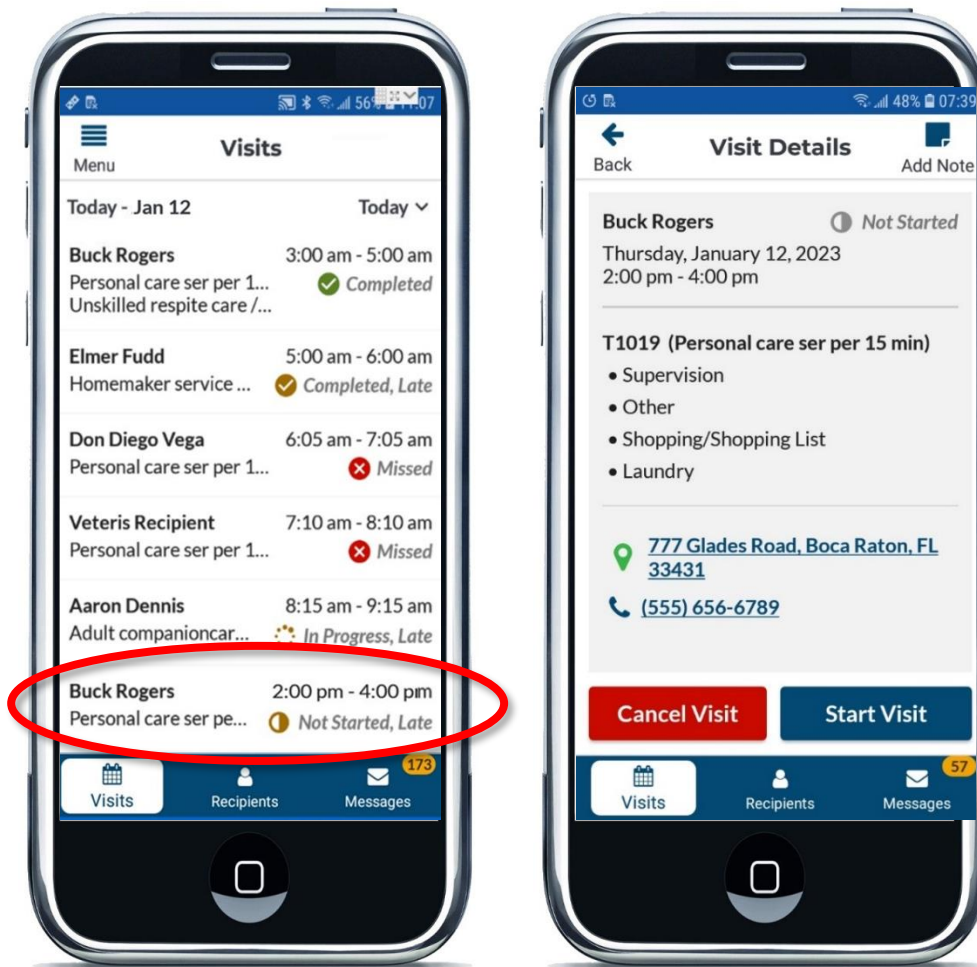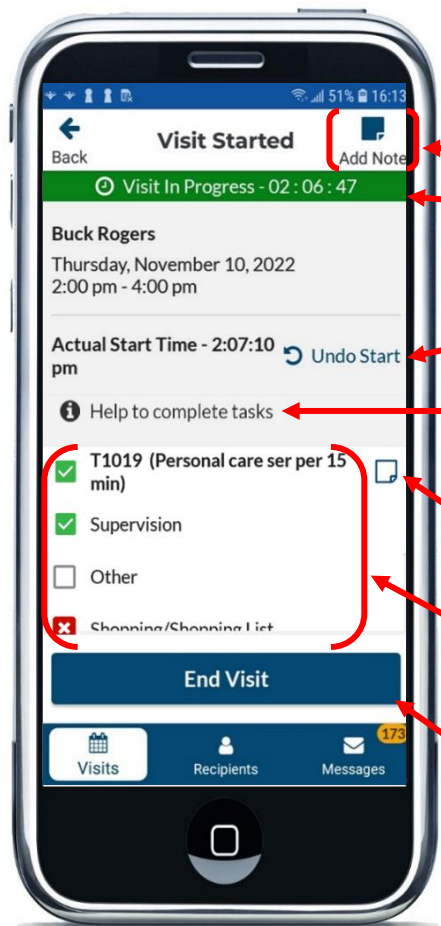
*Note: The system will display a green **Visit In Progress** bar at the top of the Visit Started screen which will display the **Total Visit Time** recorded for the service(s).*

3. Configure Services and Tasks.

9.1.1. Services and Tasks

i. Clear the checkmark next to procedure code(s) for any service(s) which have not been completed; ensure there is a checkmark for completed services.

ii. Place a checkmark in the checkbox next each completed task.

iii. Double click on any Task(s) that the Recipient refused – a red "X" will be displayed next to any Task(s) that has been marked as refused.

iv. After completing all assigned services and tasks, tap **End Visit** to stop the timer and display the **Visit Summary** screen.

Add Note	Tap to **Add Note** to Recipient's Mobile Caregiver+ Record.
⏱ Visit In Progress - 02:03:11	**Visit in Progress** bar displays timer depicting **Total Visit Time** recording for service duration.
↺ Undo Start	Tap to cancel visits that were mistakenly started.
ℹ Help to complete tasks ... INFORMATION	Tap to display an information box containing information on how to mark tasks as complete, incomplete, or refused.
🗋 Add Service Note	Tap to add a Service Note to the Recipient's Mobile Caregiver+ Record.
Services & Tasks ✅ Completed ❌ Refused ⬜ Not Completed	Allows Caregivers indicate completion status for each assigned service(s) and task(s).***
End Visit	Tap to end (clock out of) a visit.

Note: If you want to add notes or send alerts, tap the **Visit Note** icon, ![icon]. See [Adding Notes and Sending Alerts](#) for more information. Visit Notes can be added to any scheduled visit Recipients, regardless of the visit status.

Tap the **Service Note** icon, ![icon], see [Adding Service Notes for Assigned Services](#)for more information. Service Notes can only be added visits that are in progress and that are scheduled for a single Recipient.

By default, the system will checkmark all assigned service(s); uncheck any service(s) that were not completed. Caregiver must check off all tasks that are completed in visits.

Depending on the Payer and Programs Recipients are enrolled in, Caregivers may be required to enter notes for any assigned tasks not completed. See [Adding Notes and Sending Alerts](#) for more information.

Note: The **Visit Summary** screen displays the **Total Visit Time,** the time recorded by the Mobile Caregiver+ timer.

For visits scheduled with one assigned service, the system will automatically set the billable service duration time to be equal to the **Total Visit Time** recorded by the timer.

For visits where a Caregiver has been assigned multiple services in the same visit, the system will split (divide) the **Total Visit Time** recorded time evenly between the assigned services.

Caregivers can manually configure the billable **Service Time** (the actual amount of time that will be billed) for each service by tapping on the edit icon, ✎, next to the service and then manually entering the amount of time to bill for the service.

Caregivers cannot **Complete Check Out** if the **Service Time** being billed is more than the **Total Visit Time**, the system will display an error message.

WARNING: Unchecking an assigned service will set the billable time to 0, zero; you must re-enter, configure, the billable time for any completed service that was unchecked.

4. Review Visit Summary screen and make any necessary optional adjustments to the Service Times, Services, and/or Tasks.

9.1.2. Adjusting Service Time

*Note: Caregivers can manually adjust the amount of billable Service Time(s).*

i. Tap on the edit icon, ✎, next to a service and manually configure the Service Time.

ii. Tap OK to save the manually adjusted Service Time.

iii. After reviewing and adjusting the completed Task(s) and/or billable time(s) for the duration of the service(s) tap the Complete Checkout command to display the signature screen.
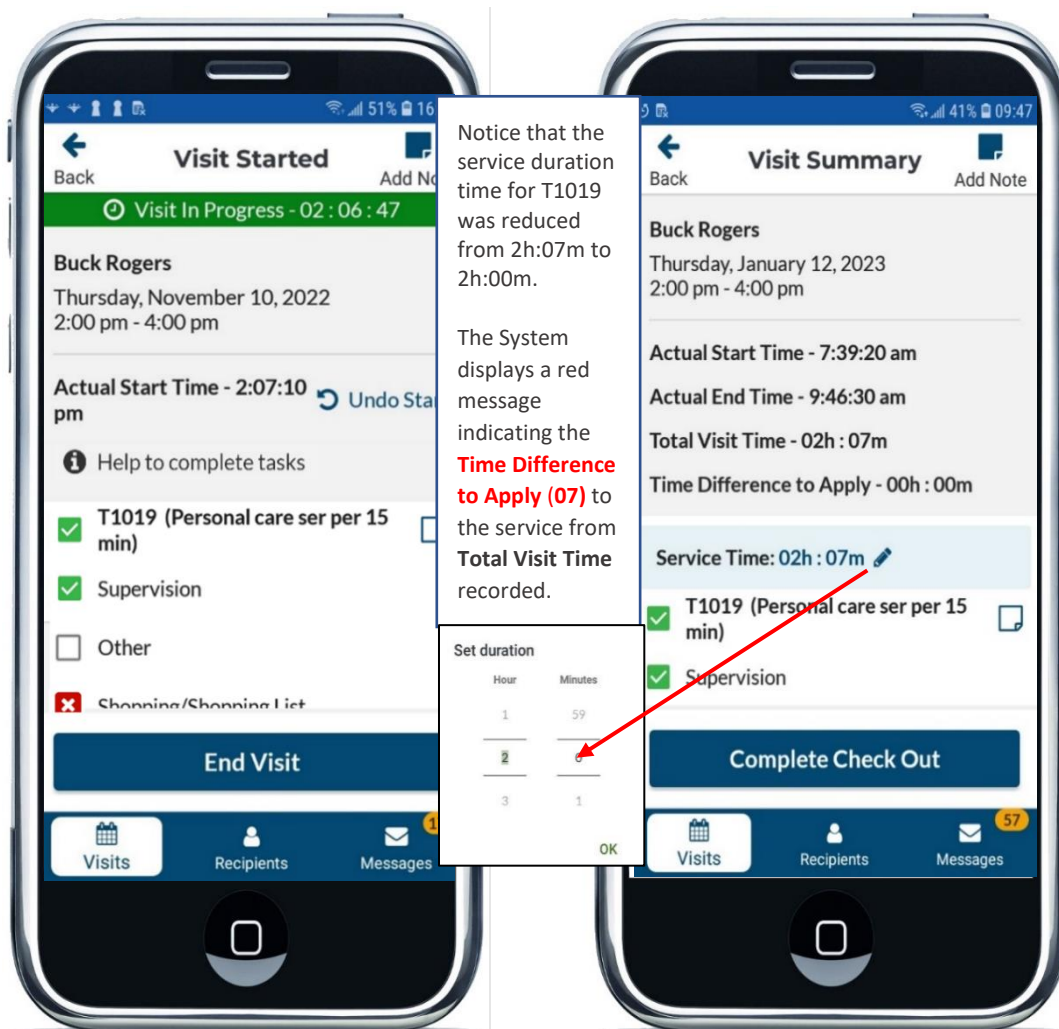
5. Record the Recipient's signature for the rendered service or select an alternative signature option listed below.

9.1.2.1. Collecting Recipient Signature

i. Below the word **Recipient,** click on the "**Who is signing?**" drop-down list.

ii. From the list, select **Recipient.**

iii. Click the Capture Signature command, ![note icon].
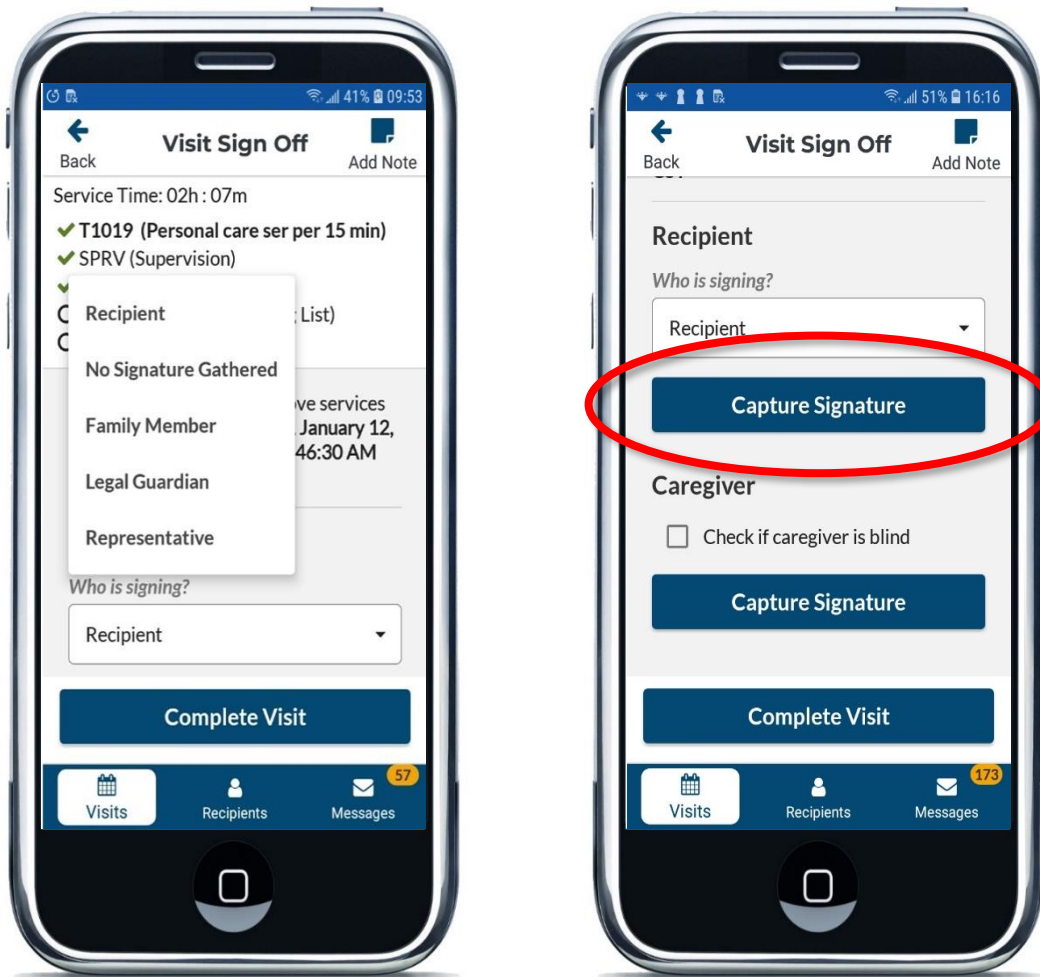
*Note: If no one, neither the Recipient or a representative, can sign, select **No Signature Gathered;** if someone else is signing for the Recipient, select the alternative signee (See instructions below).*

iv. Hand the mobile device to the Recipient and have him/her sign.

v.   Click the **Accept Signature** command to save the signature; if the Recipient signs, skip to step 15, Caregiver Signature.
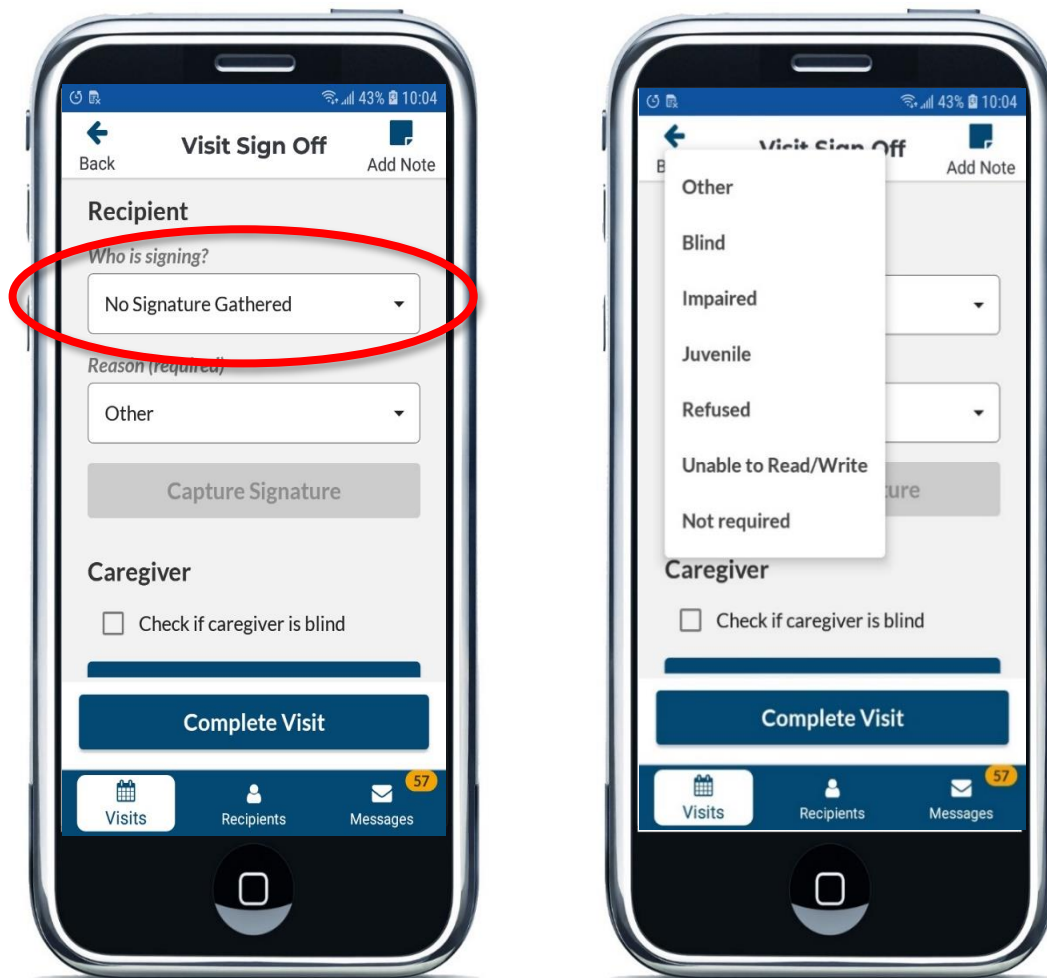
Note: you can tap the Clear Signature command to clear current signature and have the Recipient sign again, or you can tap Discard Signature to return to the previous screen and select a different "Who is signing?" option.
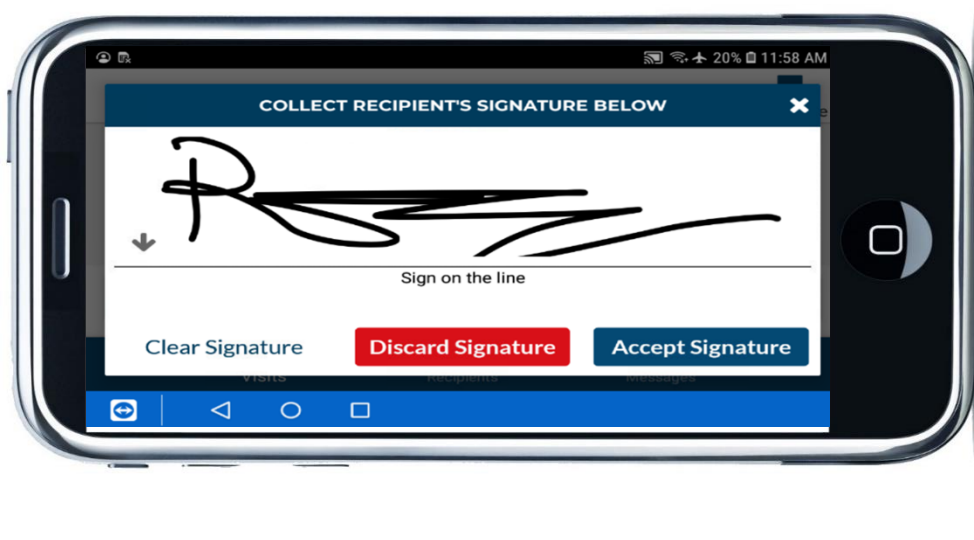
9.1.2.2.   No Signature Gathered

i.   From the "Who is signing?" drop-down list, select No Signature Gathered.

ii.   Click in the **Reason** field and select the reason no signature can be gathered.

*Note: You are required to select a **Reason** if no signature can be gathered.*
*Selecting the **No Signature Gathered** option will waive the Recipient signature.*

9.1.2.3.   Alternative Signee

i.   From the "**Who is signing?**" drop-down list, select an alternative signee**.**
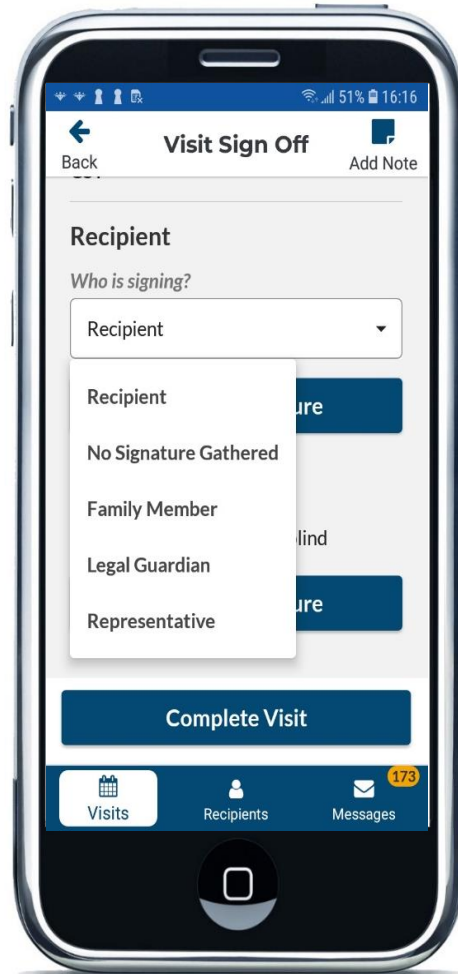
ii.   Hand the mobile device to the alternative signee and have him/her sign.

iii.   Click the **Accept Signature** command to save the signature.
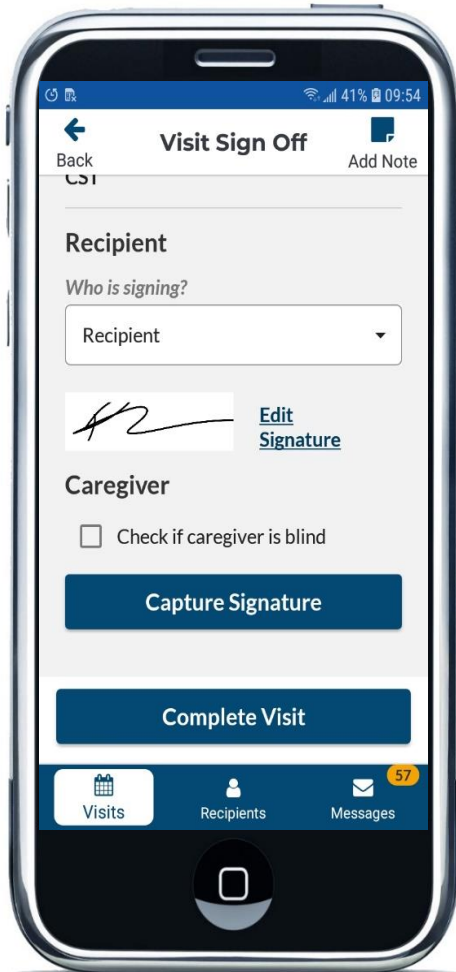
*Note: you tap the **Clear Signature** command to clear current signature and have the alternative signee redo his/her signature, or you can tap **Discard Signature** to return to the previous screen and select a different "**Who is signing?**" option.*
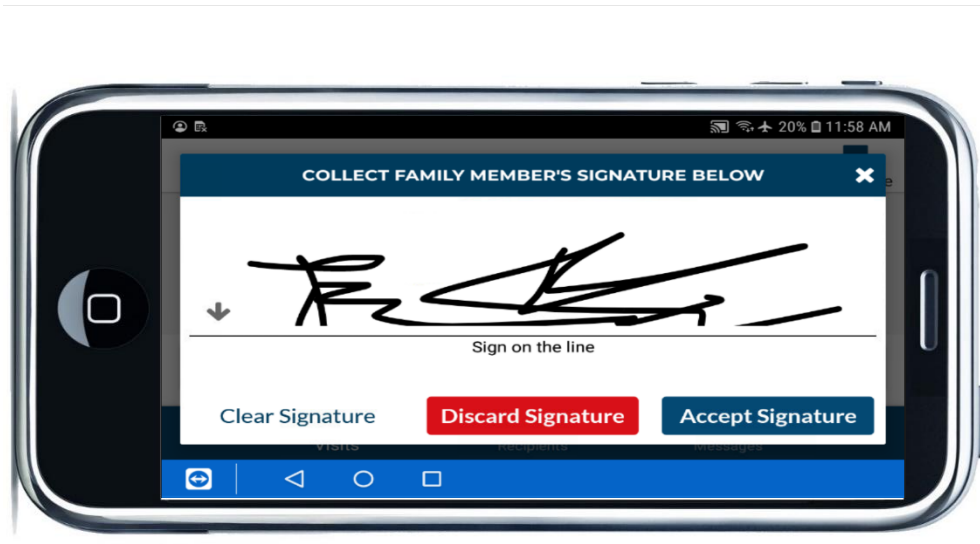
6. Enter Caregiver signature for rendered service.

9.1.3.   Caregiver Signature

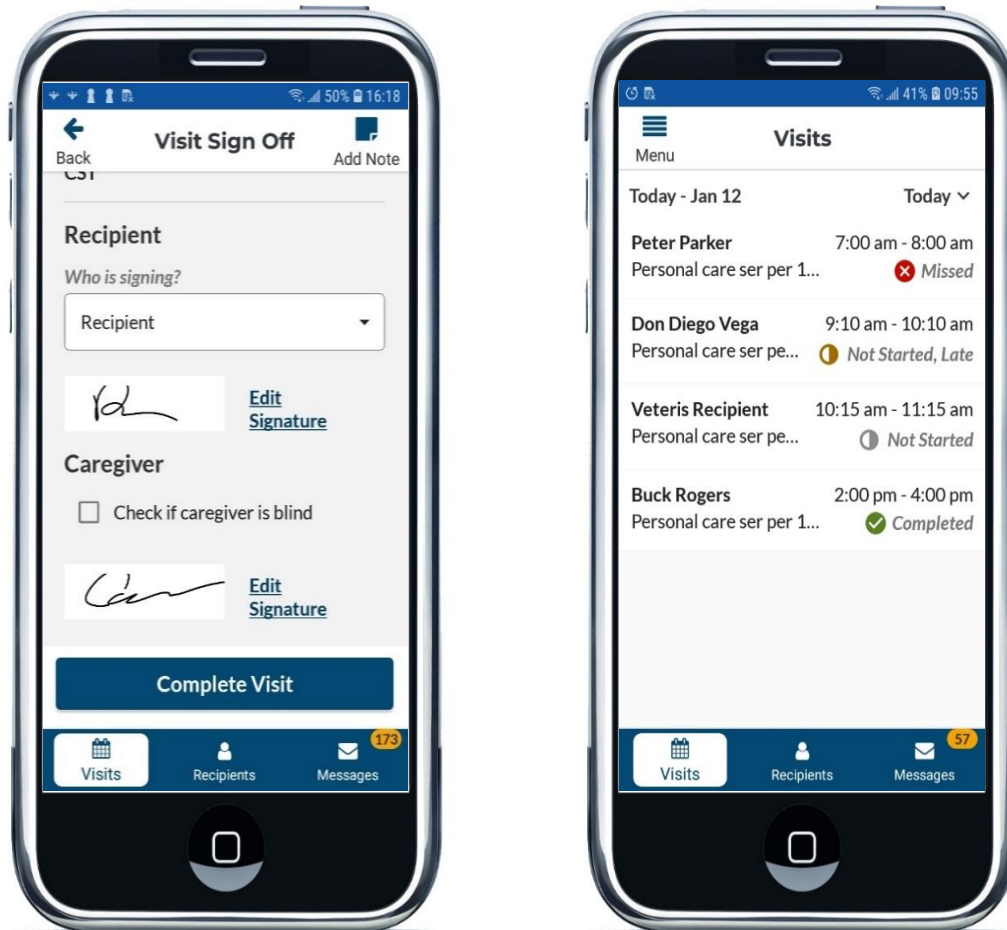i. Below the word **Caregiver,** tap the **Capture Signature** command.

ii. Go ahead and sign.

iii. Click the **Accept Signature** command to save the signature.

*Note: you tap the **Clear Signature** command to clear your current signature and sign again, or you can tap **Discard Signature** to return to the previous screen.*

7. Tap **Complete Visit** to end the visit.

Note: A confirmation dialogue box will appear, indicating that the visit is complete and successfully verified. Completed visits will be displayed on the Visits list with either a Completed or Completed, Late status.

Related Topics

- Completing a Visit when you are Offline
- Adding Notes and Sending Alerts

9.2.   Completing Scheduled Visit in OFFLINE Mode

You are here: Mobile Caregiver+ > Managing Visits > Completing a Visit When you are Offline

The Mobile Caregiver+ mobile application allows Caregivers to complete visits in remote areas and "dead-zones," locations where neither Wi-Fi nor cellular services are available to connect to the Internet. This is called operating in OFFLINE Mode.

Note: If a Mobile Caregiver+ User physically moves into an area where there is no internet connection to conduct a visit, the system will automatically switch into OFFLINE Mode; the application will display "OFFLINE Mode" in white lettering on a black background across the top of the screen.

Warning: Visits cannot be scheduled from the Mobile Caregiver+ mobile application while the application is in OFFLINE Mode. All visits must be scheduled from locations with Internet connectivity.

If you will be completing visit(s) in a dead zone, you must log in to Mobile Caregiver+ from a location where you have Internet access before entering the dead zone.

When you log into the Mobile Caregiver+ application, the system will automatically download your scheduled visits onto your mobile device. Afterwards, you will be able to complete scheduled visits that were downloaded from the EVV server, even if you enter a dead zone.

The mobile application will automatically switch to OFFLINE Mode when it detects there is no Internet connection. The system will display a black strip across the top of the screen indicating that the application has switched to OFFLINE Mode. The mobile application will automatically switch back to Online Mode when it detects an Internet connection.

Caregivers can complete visits as they normally would in OFFLINE Mode; when a Caregiver tap the "**Complete Visit**" command to upload visit data, the system will display a notice that there is no network available to connect to the Internet; the application will give display the option to "Submit later:"

When you tap **Submit later**, the encrypted visit data is and stored on your local device until you log in from a location with internet connectivity.

Warning: Caregivers will not be allowed to log into the application without Internet connection. When completing visits in OFFLINE Mode, do not log out of the mobile application until you have completed all visits scheduled to be done in OFFLINE Mode.

To complete visits in offline mode:

1. Start and complete the visit as you would normally. See <u>Completing a Scheduled Visit</u> if you need help.

   Note: After you click the Complete Visit command, the system will display a dialog box indicating "No available network" to connect to the Internet. The system will prompt you to confirm that the visit data should be submitted later.

2. Tap **Submit Later** to save the encrypted visit data to the local device.
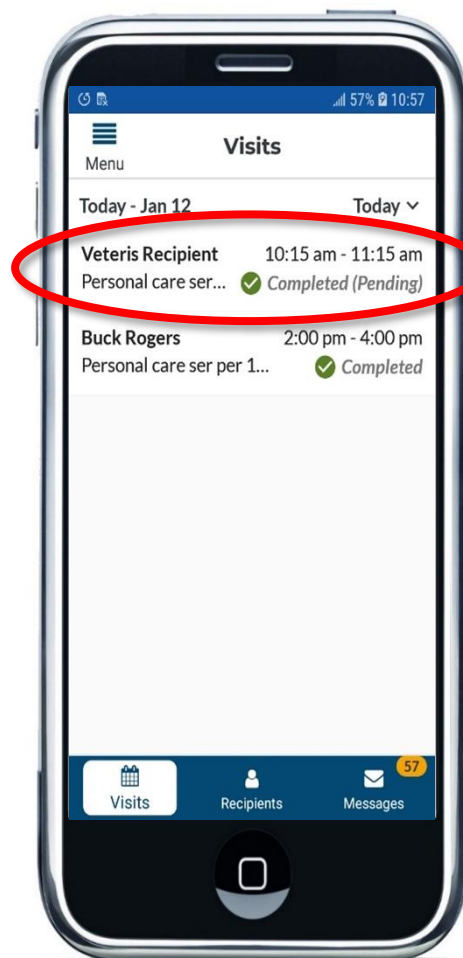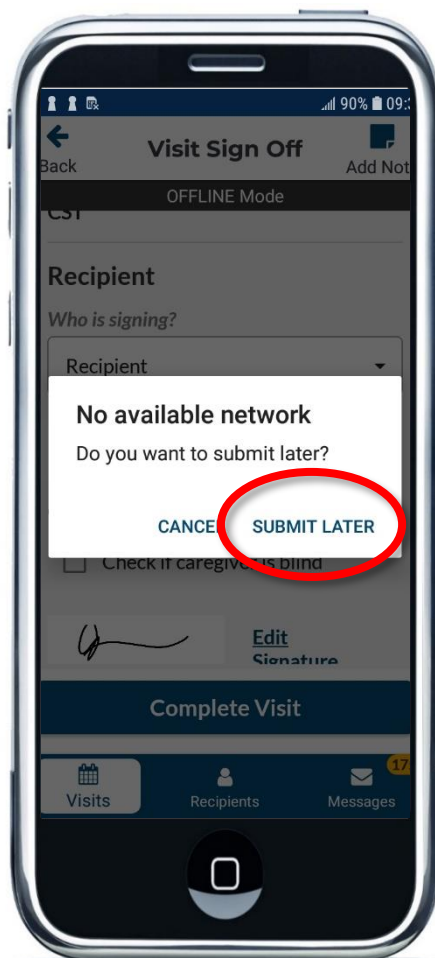
Note: Visits completed in OFFLINE Mode will be displayed in the mobile application's Visits List with a status of "Completed (Pending)."

Since offline visit data is stored locally on your smart phone/table, your Provider Admin will not see visit data until you log into Mobile Caregiver+ from a location that has Internet connectivity.

3. The next time you log into the mobile application from a location with Internet connectivity, the system will automatically upload all locally stored visit data to the Mobile Caregiver+ Provider Portal and change the visit status to Completed or Completed Late.
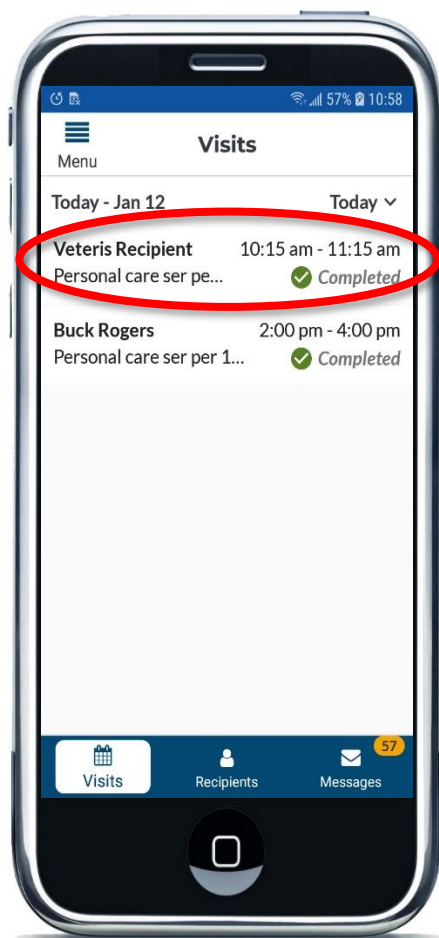
Related Topics

- [Starting and Ending a Visit](#)
- [Adding Notes and Sending Alerts](#)

9.3. Canceling a Visit

You are here: Mobile Caregiver+ > Managing Visits > Canceling a Visit

The Mobile Caregiver+ Application allows Caregivers to cancel scheduled visits. Caregivers are required to select a Reason Code for cancelling scheduled visits.

To cancel a visit:

1. Navigate to the Visits screen.

2. From the Visits List tap on the visit want to cancel.

3. Tap **Cancel** Visit to display the Cancel Visit screen and fields.
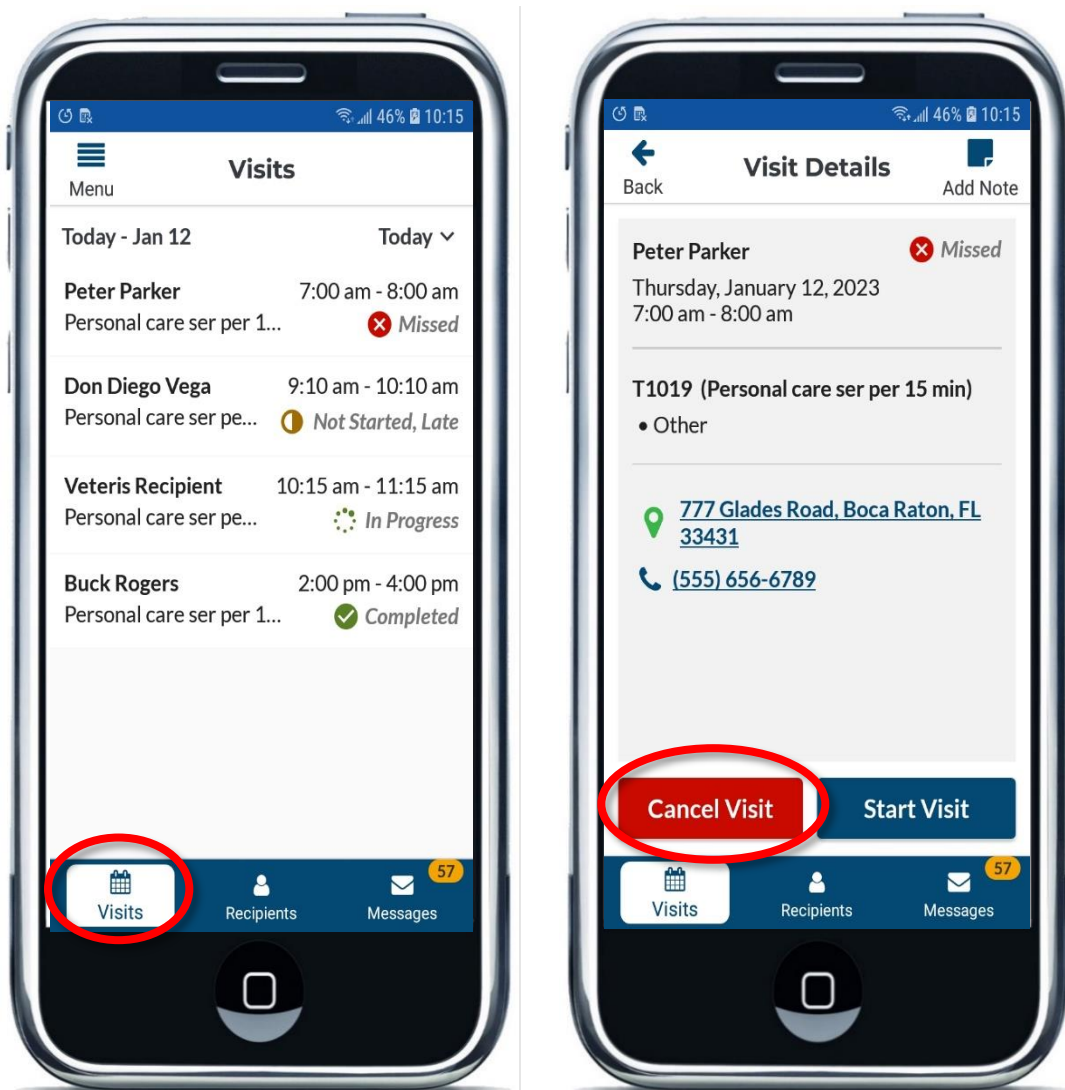
4. Click in the **Missed visit reason** field, to select the matching Missed Visit Reason Code for cancelling the visit.

5. Depending on the Payer and Program Recipients are enrolled with, Caregivers may enter notes for canceling scheduled visits.
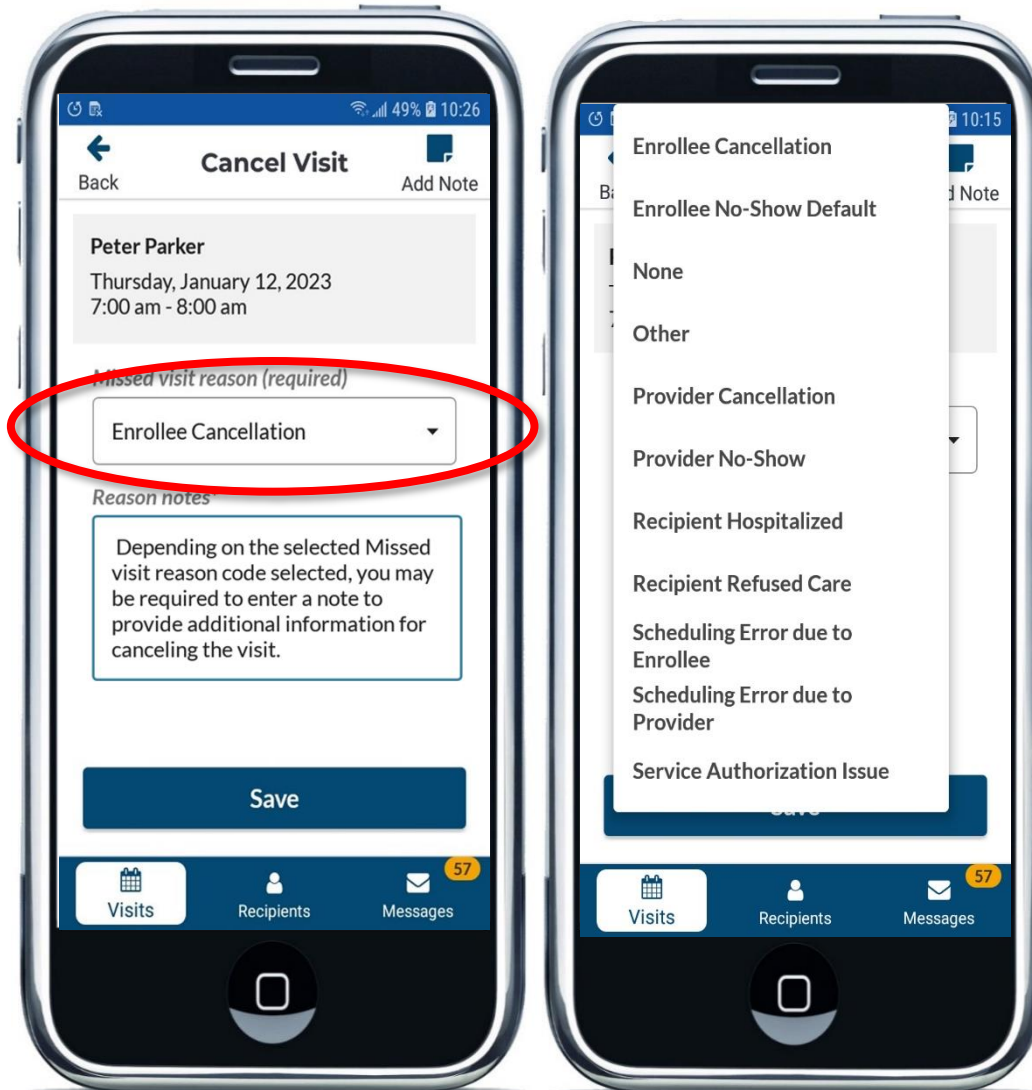
Note: Depending on the Payer and Program Recipients are enrolled with, Caregivers may be prompted to select an Action taken Reason Code and add action taken notes for canceling scheduled visits.

6. Tap **Save** to save the Missed Visit Information and cancel the scheduled visit.
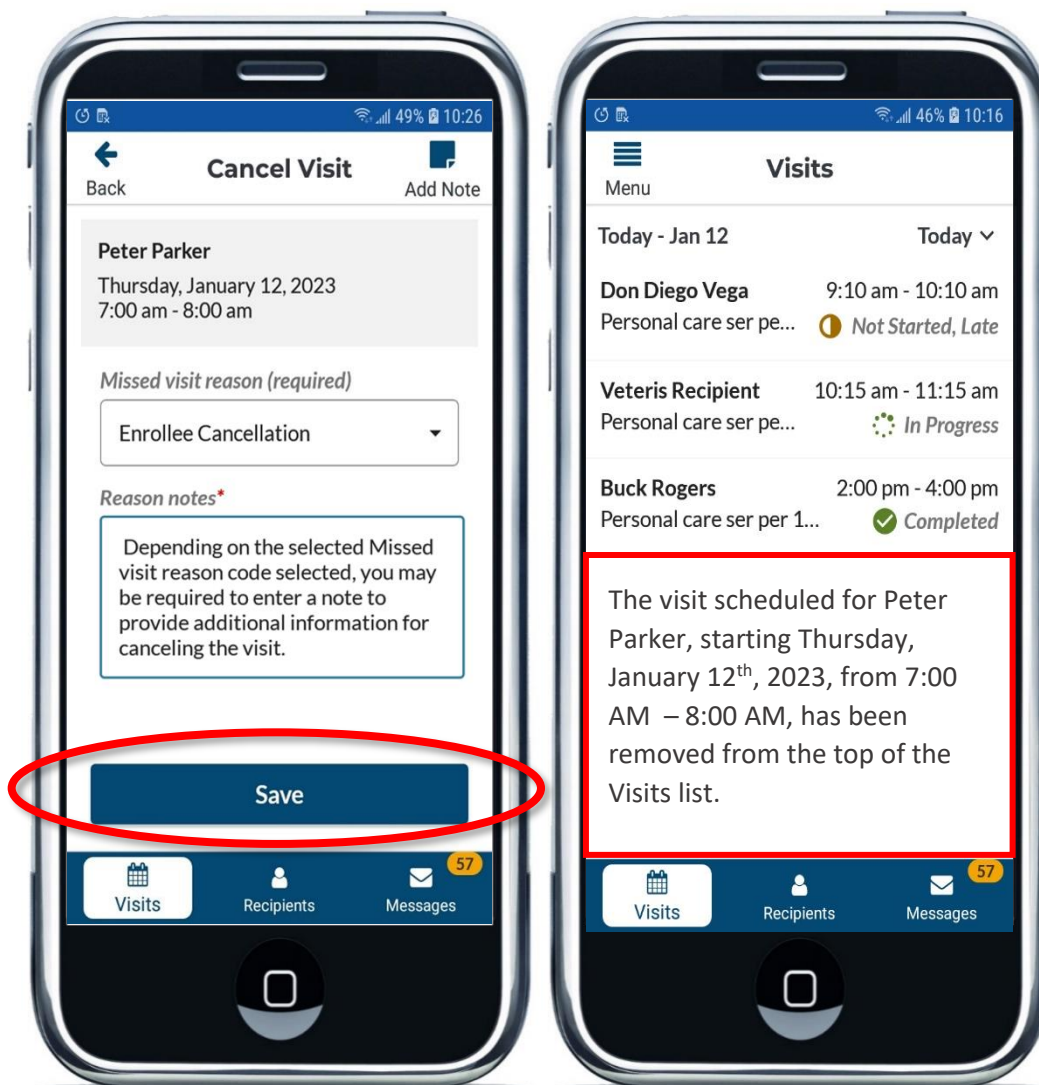
*Note: Canceled visits will be removed from the Caregiver's Visits List and will be displayed in the Mobile Caregiver+ Provider Portal with an **Unable to Complete** visit status.*

9.4. Adding Visit Notes and Sending Alerts

You are here: Mobile Caregiver+ > Managing Visits > Adding Visit Notes and Sending Alerts

You can add visit notes by opening any visit scheduled for a Recipient. Notes can be added to a future visit, completed visits, and/or missed visits. Urgent notes can be marked as alerts and sent to a Provider Admins as HIPAA compliant text messages.

Warning: *you must adhere to the rules set by your agency and/or Payer regarding adding notes.*

To enter a visit note:

1. Tap on any scheduled visit for the Recipient for whom you want to add a note.

2. Tap on the **Add Note** icon, , located in the top-right-corner of any screen of the scheduled visit.
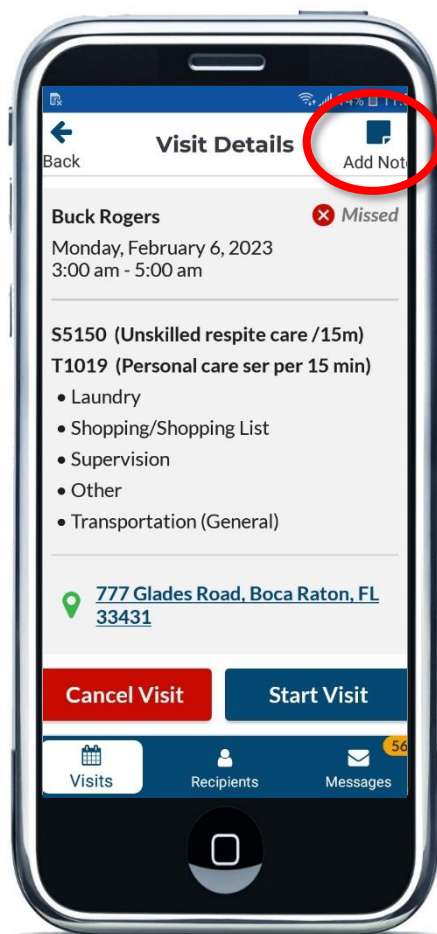
3. Type out the note you want to add in the **Enter Note** field on the **Visit Notes** screen**.**
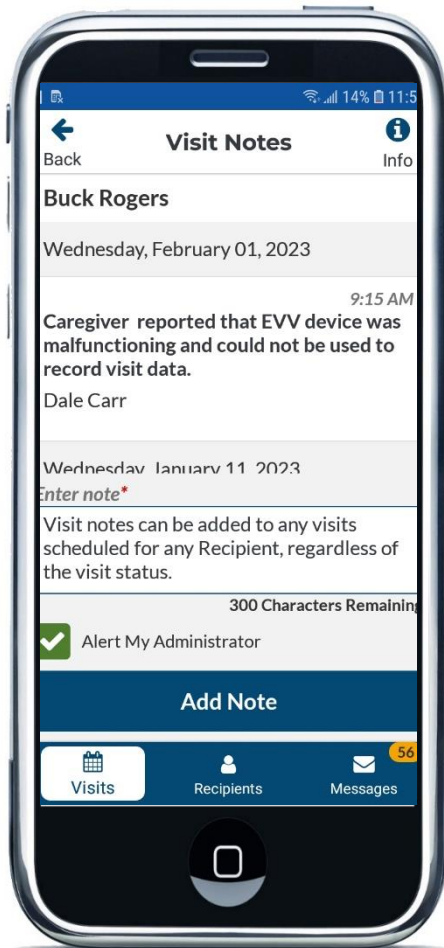
4. To send the note to your Administrator, check the **Alert My Administrator** checkbox. This will send the note as a HIPAA complaint text message to your Provider Admin.

5. Tap the **Add Note** command to save the note. If the **Alert my Administrator** option was check, the note will be sent to the Mobile Caregiver+ Provider Portal and displayed in the **Inbox** on the **Dashboard.**

Related Topics

- Starting and Ending a Visit
- Completing Visits in Offline

9.5.   Adding Service Notes for Assigned Services

*You are here: Mobile Caregiver+ > Managing Visits > Adding Service Notes to Assigned Services*

Caregivers can only add **Service Notes** for visits that are scheduled for a single Recipient and are currently In Progress or In Progress, Late.

Warning: You must adhere to all rules set by your agency and/or Payer regarding adding notes.

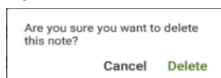To add a new **Service Note** for an assigned service:

1. Tap on the **Add New service Note** icon, ⬜, located to the right Procedure Code of an assigned service for any visit that is currently In Progress or In Progress, Late.
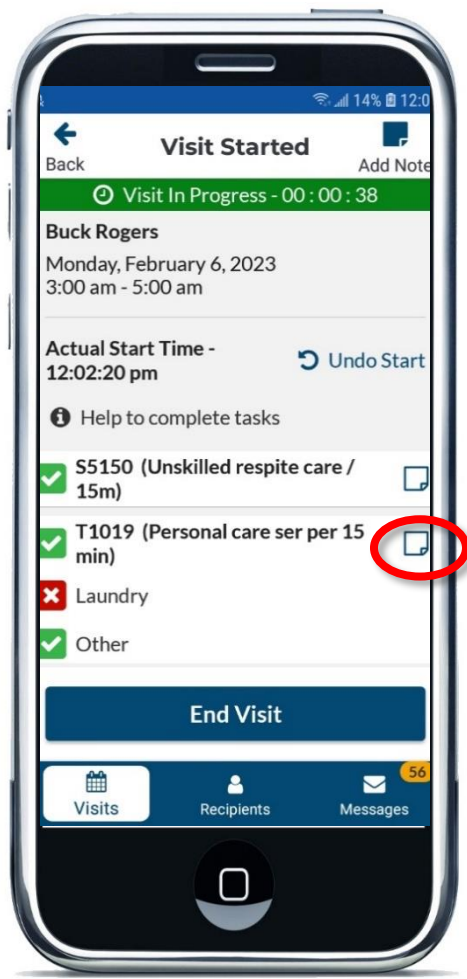
2. Type out the note you want to add in the Note field on the **Service Note** dialog box.

3. Click the **Add Note Command** to save the note.
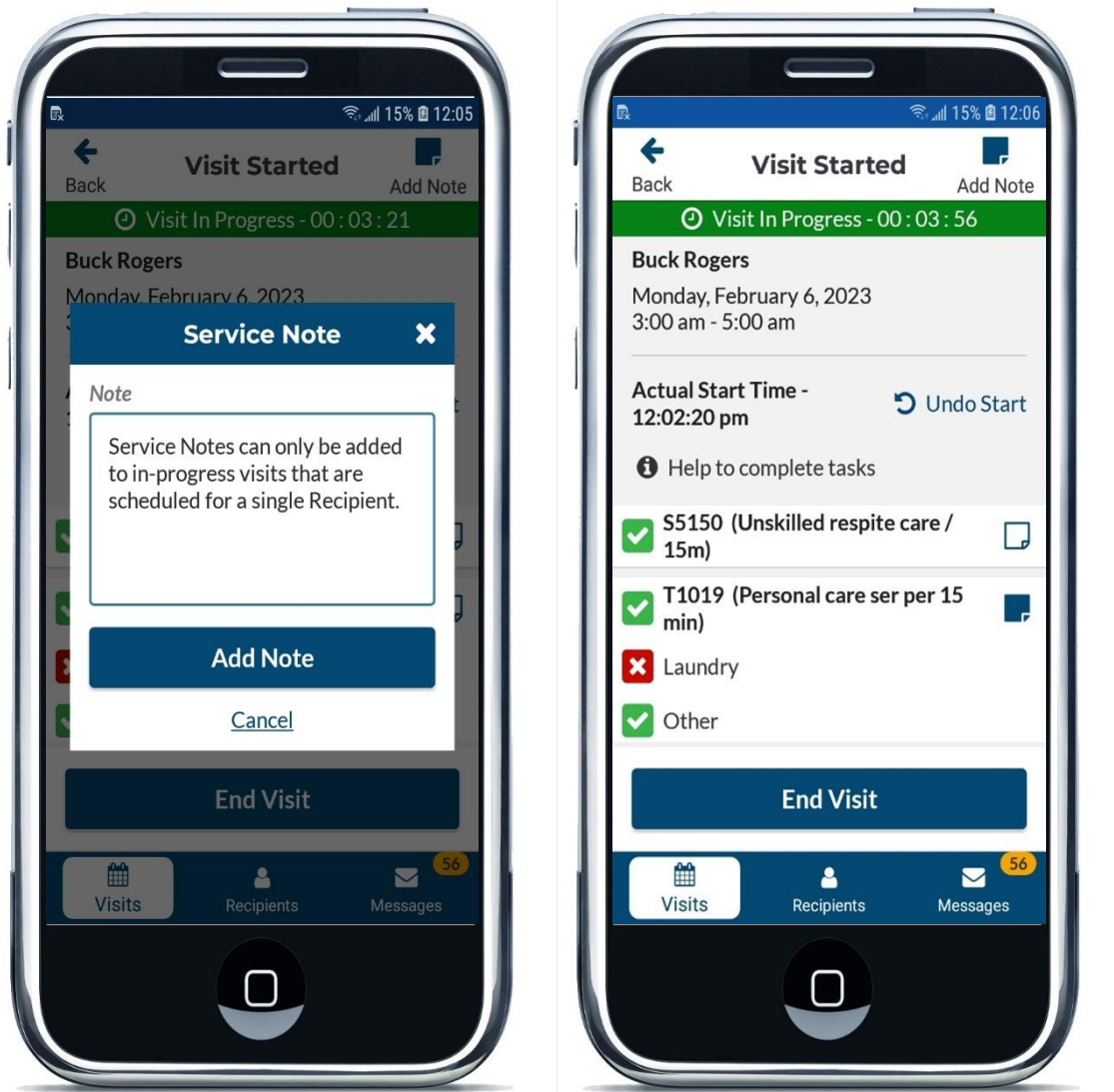
Note: The system will display a blue icon, ⬛, indicating an existing Service Noted has been added.

Related Topics

- Starting and Ending a Visit
- Completing Visits in Offline

9.5.1.   Editing Existing Service Notes for Assigned Services

You are here: Mobile Caregiver+ > Managing Visits > Editing Existing Service Notes

Service Notes** are only available for visits that are scheduled for a single Recipient and are currently InProgress or In Progress, Late.

Warning: You must adhere to all rules set by your agency and/or Payer regarding adding notes.

To edit an existing Service Note:

1. Tap on the **Edit Service Note** icon, ![icon], located to the right Procedure Code of an assigned service for a visit that is currently In Progress or In Progress, Late.

2. Edit the existing note.
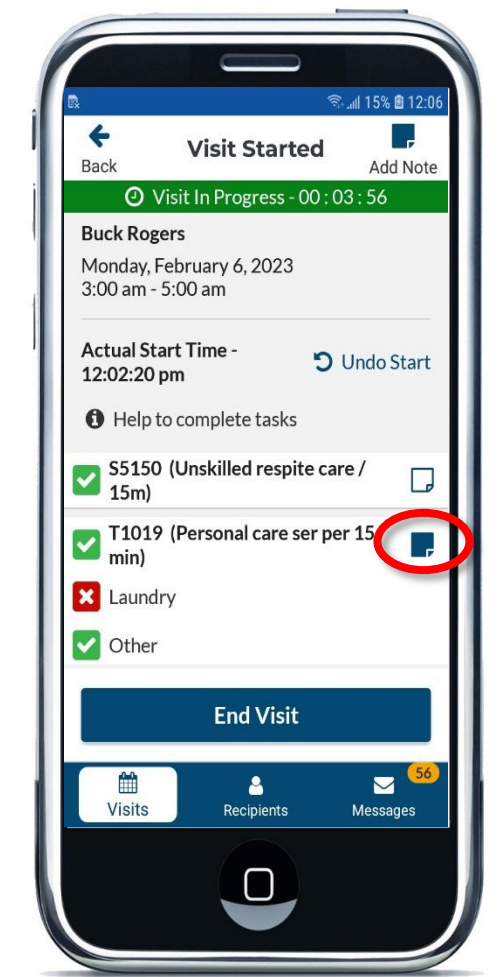
3. Tap the **Update Note** command to save the changes; tap **Delete Note** to delete the existing note.
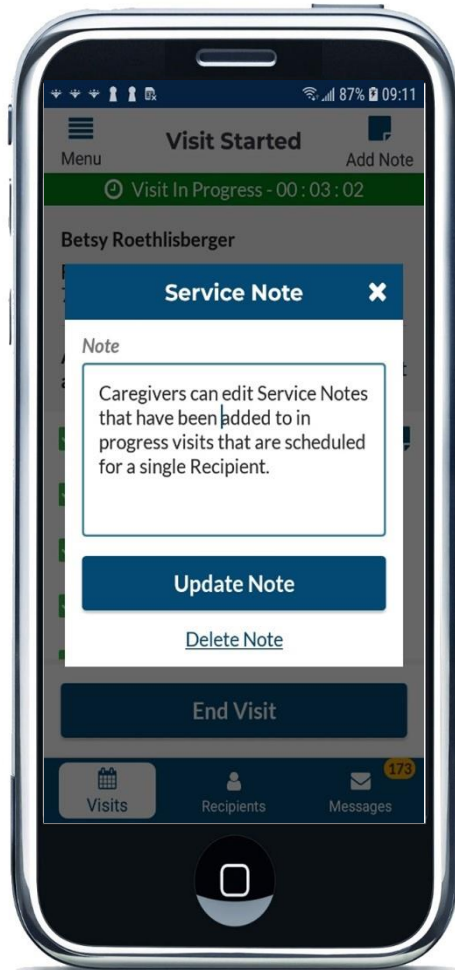
4. If you click **Delete Note,** the system will display a confirmation message which

will give you the options to **Delete** the note or **Cancel** to return to the visit screen.

Related Topics

- Starting and Ending a Visit
- Completing Visits in Offline

10.   Index