

# STEPS TO FIXING TELEPHONY CALLS

Open E-TimeCards   
 Completed E-TimeCards   
 Raw Calls

**Open E-TimeCards** - this is where you check for clock in/clock out errors by Caregivers

**Completed E-TimeCards** - Grid showing you completed E-TimeCards matching to schedules

**Raw Calls** - Pivot Grid showing Start of Call and End of Call data by Caregiver

## OPEN E-TIMECARDS - 5 STEPS FOR FIXING TELEPHONY CALLS:

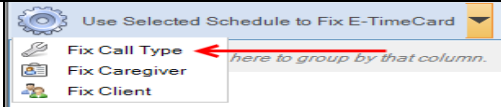
Steps to Fix E-TimeCards		A brief description of what you will need to do in each of the 5 steps to fix Telephony:
1	<b>Invalid or Missing Call Types</b>	Fix only the <b>CALL TYPE</b> , then save the e-timecard for processing. Do not fill in any other fields missing data.
2	<b>Invalid Caregiver ID</b>	Fix only the <b>CAREGIVER</b> , then save e-timecard for processing. Do not fill in any other fields missing data.
3	<b>Invalid Client ID</b>	Fix only the <b>CLIENT</b> , then save e-timecard for processing. Do not fill in any other fields missing data.
4	<b>Completed with Errors</b>	Fix the <b>NO SCHEDULE FOUND</b> . No Schedule, Schedule Has Actual Hours, Caregiver Mismatch, Schedule Was Posted
5	<b>All Remaining Calls</b>	Fix the <b>MISSING START/END OF CALL</b> . Caregiver did not clock in/out. You may need to call the caregiver or client to find out the missing time and enter into the e-timecard (Edit) and update schedule. You may require a time sheet (Attribute).
	<b>All Calls</b>	

### STEP 1: INVALID OR MISSING CALL TYPES (SCENARIOS)

- 1) Caregiver did not enter in Call Type when clocking in/out; 2) Call Type entered did not match Call Type in the system; 3) Caregiver keyed in a valid Call Type number but doesn't match up to the schedule

### STEPS TO FIX INVALID CALL TYPE:

Click on line item in Main Display area so Open E-Timecard is highlighted; Right click and select **Show** OR click on **Show** on ribbon above; Locate schedule associated with record (look for schedule matching Caregiver or Client with approximate start/end time) and click/highlight record. To fix, click on dropdown arrow beside "Use Selected Schedule To Fix E-TimeCard" and select **FIX CALL TYPE**.



If clicking on **Show** shows no schedules, you then have to highlight record and **Edit**. Click on **Schedules** (bottom right) to display possible shifts. Highlight and **Select**. Or enter in Call Type if you know what service.

**\* If your Caregivers don't enter a Call Type when they clock in, then you may skip this step and go to "Step 2: Invalid Caregiver ID" \***

### STEP 2: INVALID CAREGIVER ID (SCENARIOS)

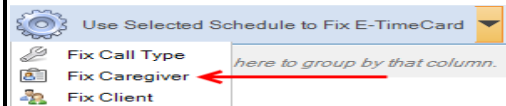
The Caregiver ID number entered does not match up to a Caregiver

### STEPS TO FIX INVALID CAREGIVER ID:

Determine which Caregiver made the visit and enter in the Caregiver ID. Use the options in the Edit Time Card toolbar to assist. Double click on open record OR highlight record and click on **Edit** in the ribbon. It will open up the Edit E-Timecard screen. Click on **Possible Caregiver** in top left corner of ribbon; the system will present you with a list of possible Caregivers with approximate start times matching the clock in time. Highlight the Caregiver that you know worked that shift and click **OK**. It will then ask you if you want to update the Caregiver. **YES**. Caregiver field will get updated on Timecard.

OR

Highlight the open E-Timecard record in the Main Display area by clicking on it; right click and **Show** to bring up listing of possible schedules beginning around that clock in/out. Highlight appropriate schedule (look for schedule closely matching clock in/out); To fix, click on dropdown arrow beside "Use Selected Schedule To Fix E-TimeCard" and select **FIX CAREGIVER**



### STEP 3: INVALID CLIENT ID / MULTI PHONE ID (SCENARIOS)

- 1) The system does not recognize the phone number the Caregiver called from when they clocked in/out; 2) The Caregiver called from the Client's phone or the phone number of an attached organization; however, the phone number entered into Companion is incorrect; 3) The Caregiver called from the Client's phone or the phone attached to the organization; however, the client or organization has more than one phone number and that dialed number not entered onto Client's or Organization's (relationship) Communication records; 4) The Caregiver did not call from the client's phone number or the phone of an attached organization. **Multi Phone ID**: System has detected 2 different clients with the same phone number, matching the phone number the Caregiver called in from.

### METHODS TO LOCATE WHO THE CLIENT IS:

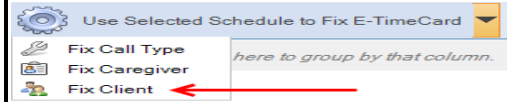
First, we need to determine where the Caregiver called from in order to determine the cause of the error; The number the Caregiver clocked in/out from will show in the Phone Number field in the Detail Panel of the Edit E-TimeCard screen; In the edit screen, top right corner, there's the **Anyone Who Has It**, which will search Companion for anyone that has that number. If screen pops up with no Clients, the number not on anyone's profile; If Anyone Who Has It brings up no result, then click on **Search 411** or **Search Google**; this will open up an internet browser window and will bring up results of who the phone number belongs to (whitepages.com or google.com). If a landline, most searches will bring up First Initial and Last Name of who the number belongs to. If a cell phone (which it will tell you), it normally does not bring up name. You can opt to pay to find out who it belongs to (landline or cell) OR you can speak to Caregiver to find out who Client was; Once you know that the number is the Clients, you can go ahead and add number to their profile on the Edit E-TimeCard screen by clicking on the **Add Phone To Client** option. Record will update. **OR**, you can call number back to find out who it belongs to.

### METHOD TO DETERMINE WHO THE CLIENT IS (Facility-based or Husband/Wife Schedule):

Select **Anyone Who Has It** from the edit E-TimeCard ribbon, showing all clients with that number. If needed, click on Schedules in the bottom right display toolbar to display possible schedules. Once determined correct client, enter name in Client field and click Save. Record will update.

### STEPS TO FIX INVALID CLIENT ID / MULTI PHONE ID:

In the Main Display area of the screen, click/highlight open E-TimeCard and Show OR highlight record and click on Show in the ribbon above. If would generate a list of possible schedules that start around that clock in/out time. Once you locate the appropriate schedule, highlight and click on dropdown arrow beside **Use Selected Schedule To Fix E-TimeCard** and select **FIX CLIENT**.



OR

Double click or highlight open E-TimeCard record and click on Edit in the ribbon above. If you know who the client is, you can enter in their name in the Client field OR you can click on magnifying glass and search/select client. It will ask you want to update the client. **YES!**

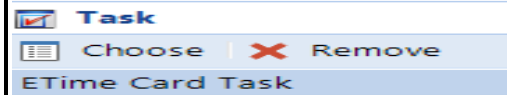
### STEP 4: COMPLETED WITH ERRORS (SCENARIOS)

- 1) **System could not find a schedule associated with an Open E-TimeCard OR more than 1 schedule exists;** 2) **The Caregiver clocked out with Invalid Task Codes;** 3) **Overlaps occur when fixing an open E-TimeCard with a missing start or end date and time. This usually occurs if there was a manual adjustment of time to the TimeCard. If dealt with, you would then Cancel the record.**

### STEPS TO FIX CALLS COMPLETED WITH ERRORS:

**No Schedule Found** - Determine if schedule really is missing. If it is, there are 2 ways to fix: (1) Create Schedule in Client/Caregiver Calendar. Come back to Telephony records; Highlight record and click **Show**. Find newly created schedule, highlight, and click on **Use Selected Schedule To Fix E-TimeCard**. - OR - (2) After confirming no schedule on calendar, in Telephony records, highlight E-TimeCard and right click and select Create (or highlight record and click **Create** off of ribbon). The system will create schedule with Clock In/Out times on it and place on Client and Caregiver for you!

**Invalid Tasks** - Highlight Open E-TimeCard and click on Edit or double click on E-TimeCard to open the Edit Time Card window. In the bottom right-hand corner click on icon with red check mark (Task). Then you can click on **Choose** and add the tasks associated with this visit. Once completed, click on **Save** and record will close and update with those tasks. **Task Code Icon:**



**Overlapped Visit** - Whenever you save an open E-TimeCard, the system will look at the completed E-TimeCards for any caregiver time overlaps. If one or more exists, determine which record is correct and which is the one you need to change. Viewing the history for the Open E-TimeCard and the completed E-TimeCard is a good way to do this.

**More Than 1 Schedule Exists** - Use the Display Schedules for options in the Edit TimeCard window (highlight record and click Edit) to determine which schedule should be matched to the open E-TimeCard. Highlight the appropriate schedule and click on **Select** and then **Save**. The system will update the schedule with the timecard information and send E-TimeCard to the Completed TimeCard section.

### STEP 5: ALL REMAINING CALLS (SCENARIOS)

- 1) **The Caregiver did not call into the system when they were at a clients to start a visit;** 2) **The Caregiver did not call into the system when there ending a visit at a client's home.** 3) **Invalid Date or Time of Visit**

### STEPS TO FIX ALL REMAINING CALLS:

**Missing Start Of Call (Did Not Clock In)** - Enter the correct date and time. If you require a signed time sheet, you may want to add a Needs Paperwork attribute to the schedule. If you do, you'll need to make sure that the **Needs Paperwork** attribute is added to default attributes in your Telephony setup and the Add Attributes To Schedule option is selected in the Edit E-TimeCard screen.

**Missing End Of Call (Did Not Clock Out)** - Enter the correct date and time. If you require a signed time sheet from the client as proof of visit, you may want to add the Needs Paperwork attribute to the schedule. If you do you will need to make sure the needs paperwork attribute is added to the default attributes in your telephony setup (Agency Office) and that the Add Attributes To Schedule option is selected in the Edit TimeCard screen. If applicable, add in a Call Type.

**Invalid Date or Time** - Check the start and end dates and the start and end times and correct the invalid entry.

To fix the call if there is a clock in or clock out, highlight record and click on **Show**. If schedule shows, highlight and click on **Use Selected Schedule to Fix E-Time Card**. It'll ask if you want to match - **Yes**. Record will update.

