

Professional Home Health Care, Inc.

(Colorado Springs or Pueblo)

Handout for Aides

on

HORIZON HOMECARE TELEPHONY

CONFIDENTIAL

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PHHC Telephony

Overview:

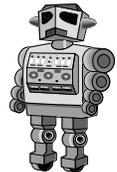
Telephony is a computer program which allows you to enter services and tasks into PHHC's computer database from the client's home telephone. At PHHC, the aides (CNAs and PCPs) use this system to document their visits. Telephony is comparable to an automated banking telephone line. When dialing a local bank's telephone number, specific personal identification information is entered and a pre-recorded menu of options is used to make banking decisions. PHHC's Telephony system functions in much the same manner, allowing the PHHC aides to:

- Access visit information (i.e. customer name, directions to the home) or assigned visits
- Select and record the services performed, including vital signs, while in the patient's home
- Record arrival time and departure time for payroll and billing
- Receive personal messages from the office
- Listen to the care plan for the client
- Enter reasons as to why a care plan item could not be completed

Features:

Telephony provides many functions including:

- Text-to-speech technology for employee names, patient names, patient addresses, patient telephone numbers, "directions to home" information, telephony care plan items, personnel messaging, etc. This is a robotic-like voice that is difficult to understand at first, but after a few calls to the system you will be able to understand it and recognize the information needed.
- Horizon Security with your own personal Telephony ID and passwords.



PASSWORD = CONFIDENTIAL

Your PHHC Telephony I.D. # is: _____

- A Call Monitor application for the Voice Response Unit (VRU) server which provides real-time information. This means the PHHC office staff will be able to watch your progress as you go from client to client.

RULE: If you do not call from the client's home within a few minutes of the assigned time, a call will be placed to you. If you cannot be reached in 20-30 minutes, your visit will be canceled and you will be unable to chart or be paid for this visit, unless you call the office.



Benefits for You:

The PHHC Telephony system helps the PHHC aides by:

- eliminating the amount of time required to complete PHHC visit paperwork
- eliminating the need for you to drive to the PHHC office or pay postage to mail in your timecards
- decreasing payroll errors due to missing or late timecards
- improving the accuracy of your paycheck

Terms:

- *VRU -Voice Response Unit* - The VRU answers incoming calls for PHHC's Telephony and inserts that data into the PHHC Horizon database.
- *ANI -Automated Number Identification* or Announced Number Identification - The ANI identifies the telephone number from which the call originated. Normally this will be the client's home telephone number.
- *DNIS -Dialed Number Identification System* - The DNIS is the telephone number you dial to reach the PHHC Telephony system. For PHHC aides this number is:

PHHC Telephony #: **(866) 451 - 6350**



- *Barge-In* -The ability for an experienced caller to press phone keys in response to questions not yet asked by the VRU. When this occurs, the VRU will immediately "fast forward" and allow callers to not have to listen to every prompt. You are going to learn to love this feature!!

General Information About PHHC Telephony

A. **RULE: DO NOT HANG UP THE PHONE DURING A TELEPHONY CALL!!!!**



Noooo!!

Instead, select the pound or # key on the telephone dial pad until either a dial tone or “Thank you for calling Horizon Homecare Telephony” is heard. This will ensure that all available phone lines are open for additional Telephony calls. If you hang up the phone BEFORE you hear a dial tone or the “Thank you for calling Horizon Telephony” you will temporarily BLOCK that telephone line from being used by other PHHC aides.



Do not hang up the phone during a Telephony call.

B. Retries

The retry count for any part of the Telephony call process is set to three retries per call entry. An error requiring a retry could be due to non-entry, incomplete entry, or erroneous entry. For example, you may press “#” when you were supposed to press “1.” When the retries are exhausted, the current speech in progress is terminated and the system will state, “Sorry you are having difficulty, please try your call again.” At this point use the # key to get a dial tone; remember, do not just hang up!

C. Invalid Entries

The caller is allowed to attempt re-entry of data three times before the system terminates the call. The message heard upon an invalid entry is “Invalid entry. Please try again.” Invalid entry responses occur in any of the following instances:



- Invalid user entry – i.e. you put in the wrong password.
- Invalid entry match against the PHHC Horizon database or some other data invalidation.
- A 30-second time-out period awaiting user entry without receiving any input.

Again, if you receive this message, select the # key to get a dial tone before hanging up the phone.

D. Telephony ID

The PHHC Telephony system will ask you to enter your Telephony ID (this ID is assigned to you by PHHC). The system verifies the Telephony ID entered and verifies a current Active status in Horizon. If the status is not “Active”, the Telephony call cannot be continued. Call

the Office during business hours (8 am to 5 pm) or PHHC Tech Support after hours at (303) 532 - 7259 if this occurs.

Help !

M-F 8 am to 5 pm - call the office at: (____) _____ - _____

After hours - call PHHC Technical Support at: (866) 416 - 5034.

- a. If this is your first Telephony call, the system will prompt you to enter and confirm a password.
 - i. Select and write down your password.
 - ii. We suggest you use the last four digits of your Social Security #.
 1. The password you have chosen is: _____
 - iii. Enter these four digits. Press #.
 - iv. When the system asks to verify the password, re-enter the password and press #.
- b. If you have an existing password, the system will prompt you to enter your password. Enter the password and press #. The system will verify that it is a valid password.
- c. Messages - If you have been assigned to receive any Telephony messages, you will be prompted to listen to them. Once a message has been listened to, you will be prompted to confirm the message. If the message is not confirmed, it will remain assigned to you and you will be prompted to listen to it during the next call.



What is the normal process for using Telephony?

The PHHC Telephony Process

Summary:

1. Call the evening before to check your assignments for the next day.
2. When you arrive at your first client visit, call the PHHC Telephony phone # using the client's home phone.
3. Provide the care assigned for this client.
4. Call the PHHC Telephony system again just before you leave the client's home (again using the client's phone) to record the departure time and the care provided.
5. Go to the next client and repeat this process.
6. By the end of the day, your visits are completed and so is the required documentation.

How to Use the PHHC Telephony System:

Press 1 = visit processing (chart a visit or travel time)

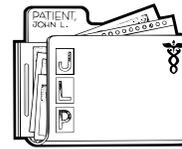
Press 2 = non-patient related activity (not used by PHHC staff)

Press 3 = scheduling information (hear information about your schedule, clients, etc.)

1. The Information Only Call

A. PHHC Telephony allows you to listen to your schedule for today and beyond without opening a visit. You can listen to the:

- number of orders (or visits) for the day
- the times for those visits (or orders)
- the associated service (CNA, PC, RC, or HM)
- care plan items assigned
- patient address
- directions to home
- patient's phone number



- i. Each evening you will call the PHHC Telephony # listed above to review your schedule for the next day or next week using PHHC's Telephony system.

RULE: YOU MUST CALL THE PHHC TELEPHONY SYSTEM EACH EVENING.

The PHHC Scheduler will assign visits to you based on the Availability you gave PHHC. Changes to the PHHC schedules are made every day, so you must check your schedule at least daily.

- B. The system will ask if you would like "to hear schedule information." Press the # key to hear this information.

2. The Arrival Call

Completing a visit in the PHHC Telephony system consists of two parts, an arrival call and a departure call. Employees complete the arrival information at the beginning of the visit when they “arrive” at the client’s home and the departure information at the end of the visit just before they leave the client’s home.

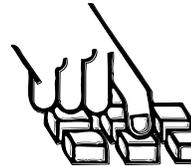


- A. You will arrive at the client’s home at the assigned time and make the “Telephony Arrival Call.”

RULE: YOU MUST CALL FROM THE CLIENT’S TELEPHONE. Employees who do NOT call from the client’s home telephone (when allowed) will be disciplined.

The PHHC Telephony system is set up to recognize the client’s home from which you are calling.

- i. Employee I.D.
 - 1) The system will ask you to enter your PHHC Employee I.D.# and your password.
- ii. Arrival Date:
 - 1) The arrival date defaults to the current date.
 - 2) The system will prompt you to press 1 to accept, or press 2 to override.
 - 3) A future date cannot be entered.
 - 4) The system can read back the total number of visits for the day as well as the number of completed and remaining visits. If no orders exist for the selected date, you will not be able to proceed.
- iii. Visit service
 - 1) The system reads back the service ID (i.e. PC or HA or H1, etc.) and description associated with the selected visit.
- iv. Arrival time
 - 1) The arrival time defaults to the current time. The system will prompt you to press 1 to accept, or press 2 to override.



RULE: YOU WILL USE THE DEFAULT SYSTEM TO REPORT YOUR ARRIVAL TIME, EXCEPT FOR TRAVEL TIME

v. Matching the client's phone number:

- 1) The system verifies that the incoming ANI matches a phone number associated with the appropriate patient.
- 2) If the system does not find a match, you will be asked to enter a reason code to explain why the call is not coming from one of the patient's registered phone numbers.
- 3) These reasons will be checked by the office staff. Employees who call from a phone other than the client's home phone inappropriately will be disciplined.

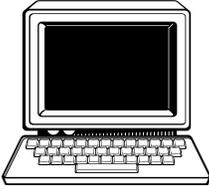


Client Phone Reasons

- 1 – Client has no phone.
- 2 – Client phone not working.
- 3 – Other.

- 4) After reviewing or skipping the care plan information for this client, press the # sign to end the arrival call.

3. The Departure Call



You will complete the visit as assigned and make the “Telephony Departure Call” to enter and record the details of the services you provided compared to the client’s care plan. The service and care plan data is saved immediately in the PHHC Horizon computer and your charting is complete for this client.

- A. You must provide and record that you provided the care assigned by the nurse or your supervisor. Occasionally, the client will refuse a service or it may not be needed that day, but in general you must provide the care ordered.

RULE: YOU MUST PROVIDE THE CARE ORDERED BY THE RN and MD or PHHC SUPERVISOR. Employees who repeatedly fail to provide the care assigned will be disciplined.

- B. In addition to recording the time and date of the departure, the system will prompt you to document the services you provided during this visit.
- C. The number of each task (i.e. 3011), and then the task description (Assist client with shower), on the care plan will be read to you and requires a response during the departure call.
 - i. The call cannot be completed until a response is provided for every task on the care plan for this visit.
 - ii. After each task is presented, the user is prompted to respond as follows:
 - 1) Specify “Completed” or that you did the task by pressing the # key once.
 - 2) To specify “Not Completed” or that you did NOT complete an assigned task, enter in a 2 digit reason code followed by the # key.



Reasons Care Not Given

- 90 – Patient or caregiver refused.
- 91 – Task not needed.
- 92 – Equipment not working or not available.

- 3) The reason code will be read back for confirmation.
- 4) If a task requires the entry of results (i.e. blood pressure), the system prompts for additional information entry for the date and time the blood pressure was taken.
- 5) The system will ask for verification that the task codes entered are correct.
- 6) When all tasks on the care plan are completed, the system will tell you so.

4. More Information on the Departure Call

A. If a care plan task requires the entry of results you are prompted between tasks to enter the information.

- i. Examples include weight, systolic and diastolic blood pressure, temperature, pulse and respirations.



B. Use the following guidelines when entering results:

- i. Entries should be numeric.
- ii. Once completed, press the # key.
- iii. Use the “star” or * key to represent a decimal point in a numeric entry.
- iv. The system will read back the results specified and prompt for confirmation.

A Sample Travel Time Telephony Call

Some of your “orders” in Telephony may be for “Travel time.” Travel time is assigned by the PHHC scheduler based on PHHC’s rules and the payer’s (Medicare or Medicaid) rules.

Assume that you have been assigned a visit, and then travel time followed by a second visit for that same morning. You will hear the following information by the PHHC Telephony system when travel time has been scheduled for you:

Telephony Recording

Your Actions

“Thank you for calling Horizon Homecare Telephony.”

Please enter your employee I.D. followed by the # sign.

Press 1, if the I.D. is correct.

To re-enter your I.D., press 2.

Press 1.

Please enter your password, followed by # sign.

Enter password, then #.

Good morning/afternoon, (your name).

For visit processing, press 1.

To enter non-patient related activities, press 2.

To hear schedule information, press 3.

Press 1.

We show your arrival date as (today’s date).

If correct, press 1

To re-enter, press 2

Press 1.

Assigned orders will be presented in order date and time order.

To begin schedule selection, press 1.

To begin a different visit arrival date, press 3.

Press 1.

The number of orders for this day is _____. You have ___ completed and ___ remaining.

There is a scheduled order at ___ am or pm for patient ___, for episode ID ___. We show the service associated with this visit as 999, travel time.

To select this order, select #.

To listen to next order, press 1

To enter a different arrival date, press 3.

Press #.

We show service as 999, travel time.

If correct, press 1.

To re-enter, press 2

Press 1.

We show the arrival time as ____.

If correct, press 1.

To re-enter press 2.

Press 1.

(If you are not calling from the patient's home phone, the system will ask why you are not calling from patient's phone.)

Thank you, your arrival information has been recorded and saved.

[you have no recorded your travel begin time.]

To visit processing, press 1.

To enter non-patient related information, press 2.

To hear schedule information, press 3.

Press 1.

We show this departure for patient ____ for episode ID ____.

If this is correct, press 1.

To exit, press the # sign.

Press 1.

We show the departure date as ____ (defaults to date you selected for arrival date).

If correct, press 1

To reenter, press 2.

Press 1.

(If you are not calling from the patient's home phone, the system will ask why you are not calling from patient's phone.)

If you would like to record mileage, enter the I.D. for mileage. To skip this entry, press the # sign only.

Press #.

There is no care plan for this order.

We show the departure time as ____ (defaults to the time of arrival plus scheduled travel time) for a duration of ____ (defaults to the arrival time plus the scheduled travel time.

If correct, press 1.

To re-enter, press 2.

Press 1 (usually).

To review any information about this visit, press 1.
To enter additional activities, press 2.
To complete this visit, press the # sign.

Thank you. The departure information has been recorded and saved.

For visit processing, press 1.
To enter non- patient related information, press 2.
To hear schedule information, press 3.

We show your arrival date as ____ (defaults to today).
If this is correct, press 1.
To re-enter, press 2.

[you will now hear information on the visit associated with this travel time. Listen to the recording and record your arrival time.]

Press #.

[you have now recorded the end for your travel time.]

Press 1.

Press # after you have recorded your arrival time for the actual visit.

5. Checking by the PHHC Office Staff



- A. Changes will appear in the PHHC Horizon Interactive Scheduler once an Arrival Call is completed. When you call from the client's home that visit assigned to you will change from "Assigned" to "In Progress."
- B. Once the departure time is recorded and visit information documented, "In Progress" will change to "Complete".

6. What about errors?

- A. If you make an error and have already completed the departure call, call the office.
- B. You cannot personally correct an error after you have completed a visit.
- C. Only the PHHC office staff can make this correction for you.

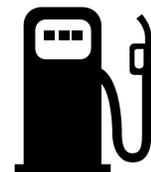
7. What about Travel Time?

- A. Travel time, when authorized, is scheduled separately before your visit.
 - i. You are paid by PHHC to "travel to" a client,
 - 1) Unless it is the first client of the day.
 - 2) Or from your last client to your home.
 - 3) Unless there is a break of longer than 1 hour between clients.
 - 4) Etc.
 - ii. Travel time is normally 15-30 minutes before your actual client visit.
 - iii. When prompted by PHHC's Telephony system, complete the appropriate time in and time out for travel time as scheduled for a client.
 - 1) Because you will arrive at the client's home AFTER you have already traveled, you will need to change the time of your travel.
 - 2) For example, if you arrived at 8:00 am and were allowed 15 minutes of travel time; override the start time and change it to 7:45 am and your departure time for travel as 8:00 am.



8. What about mileage?

- A. Mileage is paid for some CNA visits but not for PCP (personal care providers, homemakers, and relative care providers) visits,
 - i. PCPs who record mileage after being instructed not to will be disciplined.
- B. During the Departure Telephony call, you will be prompted to enter "Mileage." If you are a CNA and if this is an authorized visit for mileage, you will enter the miles to the client.
- C. Miles will be recorded using the numbers on the telephone. For example:



- i. 5 # = 5 miles
 - ii. 5*5# = 5.5 miles
 - iii. Remember to use the * as the decimal point.
- D. Mileage is NOT paid by PHHC for:
- i. The first and last visit of the day (called commuter miles).
 - ii. When there is a gap of one hour or more between visits.
 - iii. For CNAs, miles are checked by PHHC and excessive or inaccurate miles are not paid.

Telephony Care Plans

When the PHHC Personal Care Coordinator or Nurse opens a new client they find out what the clients needs are and enter them into the PHHC Horizon computer system. This is called a “Care Plan” or “Plan of Care.” Those set up in the PHHC Telephony automated system are very similar to the paper ones in the Client Notebook. The PHHC Telephony system reads the Telephony Care Plan for a client to you when you call for your schedule the night before your visits. You will also be prompted when you place an arrival time to see if you want to hear the Care Plan.



Call the office immediately if you discover a client does not have a Telephony Plan of Care. You can tell this at the Arrival Call if the system does not prompt you to review the care plan. At the Departure Call, the system will say “no Care Plan for this client.” Again, please call the office immediately if this happens.

Frequently Asked Questions and the Answers

- Q. What if I am late to my client's house due to unexpected traffic, accident, etc.?
- A. If you are less than 30 minutes late you will be able to chart, if it is later than that your visit will be cancelled and you will have to call the office before you will be able to start your visit.
- Q. What if I arrive at the client's home and s/he is not home?
- A. If you have a cell phone, you can call the office. The office staff will change your visit to a "Pay No Bill" and you will be able to call and chart your travel time (15-30 min.) at that time. If you don't have a cell phone, call the office at your next client's home. The office staff will change the visit and you can call when you get home and chart the "Pay No Bill." Or the office staff may chart this visit for you.
- Q. How long is it going to take to complete the arrival call?
- A. At first, until you get used to the process, probably 2 minutes. When you've practiced, probably no more than a minute.
- Q. How much time will it take to complete the departure call?
- A. At first, approx 4-5 minutes, when you've practiced probably no more than 3 minutes.
- Q. What if I forget to call when I arrive at the client's home?
- A. The Office staff will be watching to see when your visits change from Assigned to "In Progress". When an assigned visit hasn't been started by you, the office will receive an alert and they will be calling the client to check and see if you are there. This will be your reminder to chart.
- Q. What if I forget to chart a task(s)?
- A. You will need to call the office and tell them what you forgot and the office staff will chart it for you. You will not be able to change your charting by Telephony once you have completed a Telephony departure call.
- Q. What if the client is using the phone when I get there?
- A. We are sending a letter out to all the clients to explain the new Telephony process. You should be able to let them know that you need to call before you can get started on your tasks.
- Q. What if the client's phone is out of order?
- A. You can call on your cell if you have one. Telephony will ask you why you didn't call from the client's phone and you will be able to respond to that. If you don't have a cell phone, you will call the office from your next client or from home when you get there and explain the situation and the office will open the visit so that you can chart from your home.

PHHC Telephony Quick Tips

Telephony Phone Number: **(866) 451 - 6350**

PHHC Telephony I.D. #: _____

Password: _____

Press 1 = visit processing (chart a visit or travel time)

Press 2 = non-patient related activity (not used by PHHC staff)

Press 3 = scheduling information (hear information about your schedule, clients)

Task done or care given = #, or

Reason care not given:

90 # – Patient or caregiver refused.

91 # – Task not needed.

92 # – Equipment not working or not available.

Travel time code = 999

Reason not calling from client's phone:

1 – Client has no phone.

2 – Client phone not working.

3 – Other.

Mileage for PCPs = # to skip. Mileage for CNAs = 900.

Help Number: PHHC Office – (719) _____ - _____

After Hours Technical Support – (866) 416 - 5034