MOBILE APPLICATION CHECK-IN & CHECK-OUT GUIDE

OVERVIEW

The CareBridge Mobile Application is available for caregivers and can be downloaded from the App Store or Google Play store. If help is needed with downloading the app, please refer to the Mobile Application Download and Login Guide in the **CareBridge Resource Library**. The instructions below will aid caregivers with Checking In and Checking Out of appointments within the mobile app.

After logging in, if the caregiver already has scheduled appointments, they can find the appointment they need to work and **click** on it. If they need to create a new appointment, the caregiver can follow the steps below. ***Please note:*** When different services are scheduled one after the other, the caregiver must Check-Out of the first service and Check-In to the second service for the visits to complete and billing to occur properly.

Disclaimer: All illustrations in this document are created with an Apple iPhone. The app should look similar on iPhone and Android phones, and all app functions are named the same in both operating systems.


Figure 1. Select a scheduled appointment

CREATING A NEW VISIT AND CHECKING IN

After logging in, the caregiver will need to create an appointment for the member they are helping.

1. Click the **+ (plus sign)** at the bottom of the screen to open the Search Member screen. Enter the member's name in the search area at the top. If the member has more than one service code it is ***IMPORTANT*** to make sure that the caregiver selects the correct service code - if not it adds the visit to the wrong (prior) authorization (Figure 2).

   Notice the **gray star** on the right of the member's name. Select it to make this member a "Saved Member". This makes it easier to find them quickly at Checks-In and will also *enable off-line Check-In for this member*. Saved members have **blue stars**.

2. Click on the **Member's name**.

3. Click **CHECK IN NOW** for an immediate visit or enter the **start** and **end times** for a future appointment.

Figure 2. Create an Ad-Hoc appointment
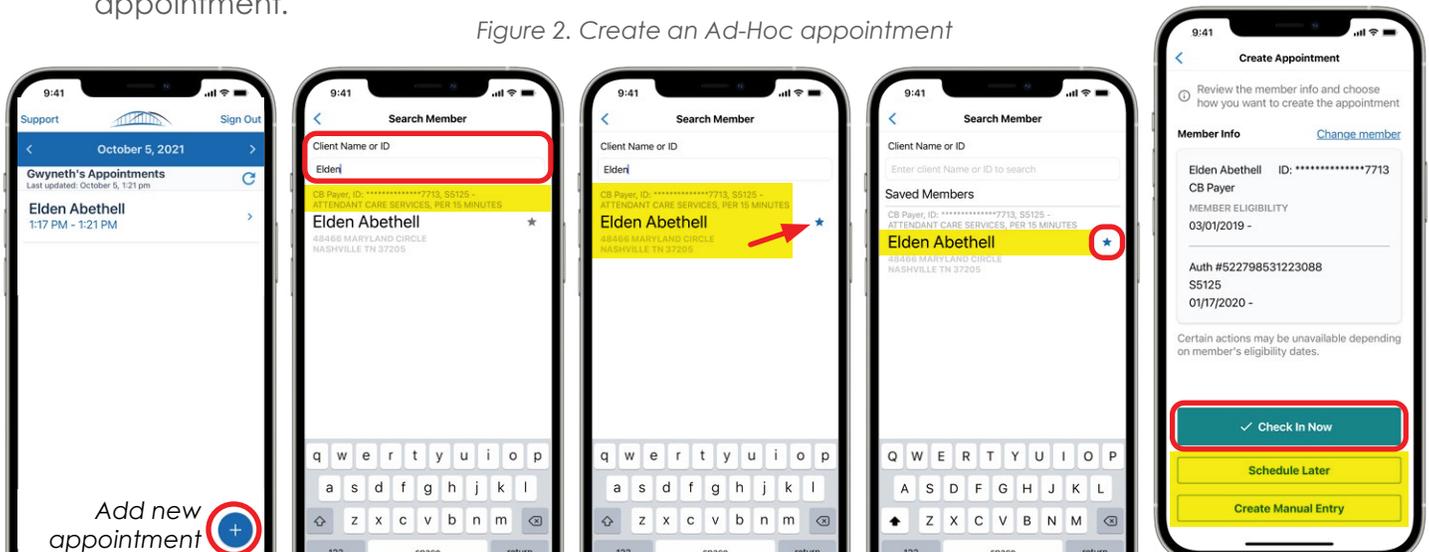
4. If **CHECK IN NOW** is clicked, the caregiver will see the GPS screen with the map (Figure 3). ***Please note:*** If this appointment was scheduled incorrectly, the caregiver can click on the **Cancel Appointment** link above the GPS map. If the appointment is correct, they can click **Next**.

5. To create a future appointment, the caregiver must click **Schedule** to confirm that appointment. Now the caregiver will be able to see the **Member** on the list. They can now click on the **Member**.

6. Next they can click **CHECK IN** and check into that appointment.

Figure 3. Checking into an appointment

7. Once the caregiver has Checked-In, **they may STOP using the app**. They can begin working the visit and assisting the member.
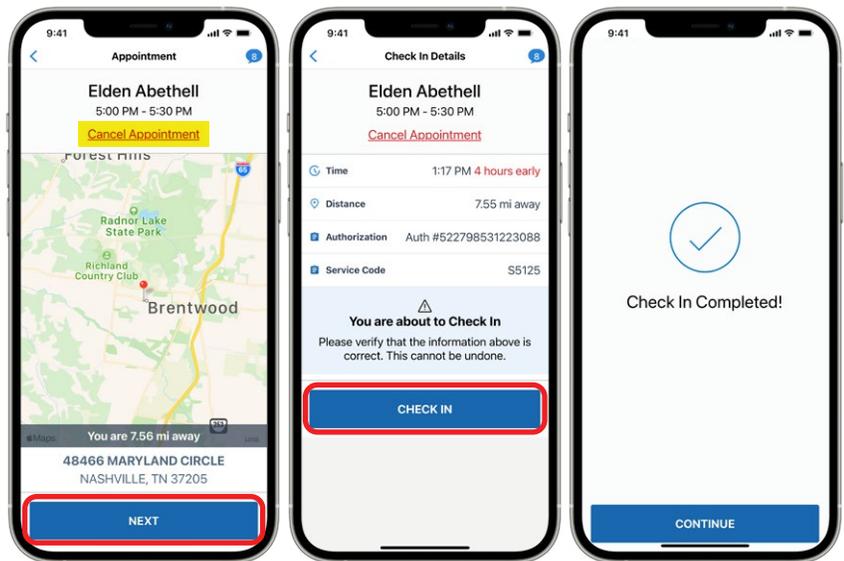
Please note: It is possible that the GPS will not pinpoint the caregiver's exact location but show something within 1/10 of a mile of their location. This is normal and the visit will still be documented.

DISCUSSIONS (FIGURE 4)

In Wyoming, provider organizations can use discussions to communicate internally. WDH is only auto-added to the discussion if an address change, observed change, or phone number update is requested. WDH can be added to other discussions if needed.

When the caregiver opens the Check In Details screen, there is a **speech bubble icon** in the top right corner. If it is **blue**, it means there is at least one unread comment. The caregiver can click on the **icon** to view Discussions. A **blue dot** shows

Figure 4. Discussions

which Discussions have unread comments. The caregiver may open and read comments in an existing Discussion by clicking on it (Figure 4). If they would like to create a new Discussion to be attached to the member (visible to office staff or caregivers working with the member), they can click the **+ (plus sign)** to add a new Discussion. ***Please note:*** All urgent issues need to be reported to WDH via the required incident reporting process already in place.
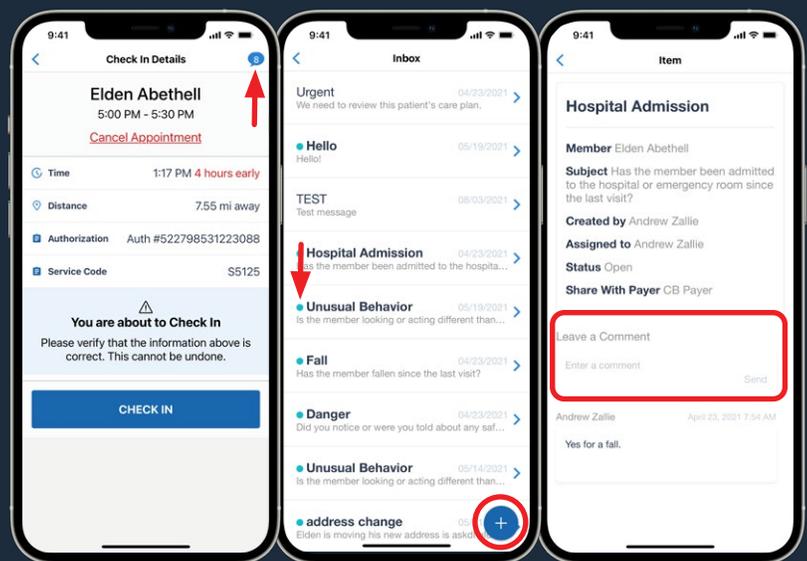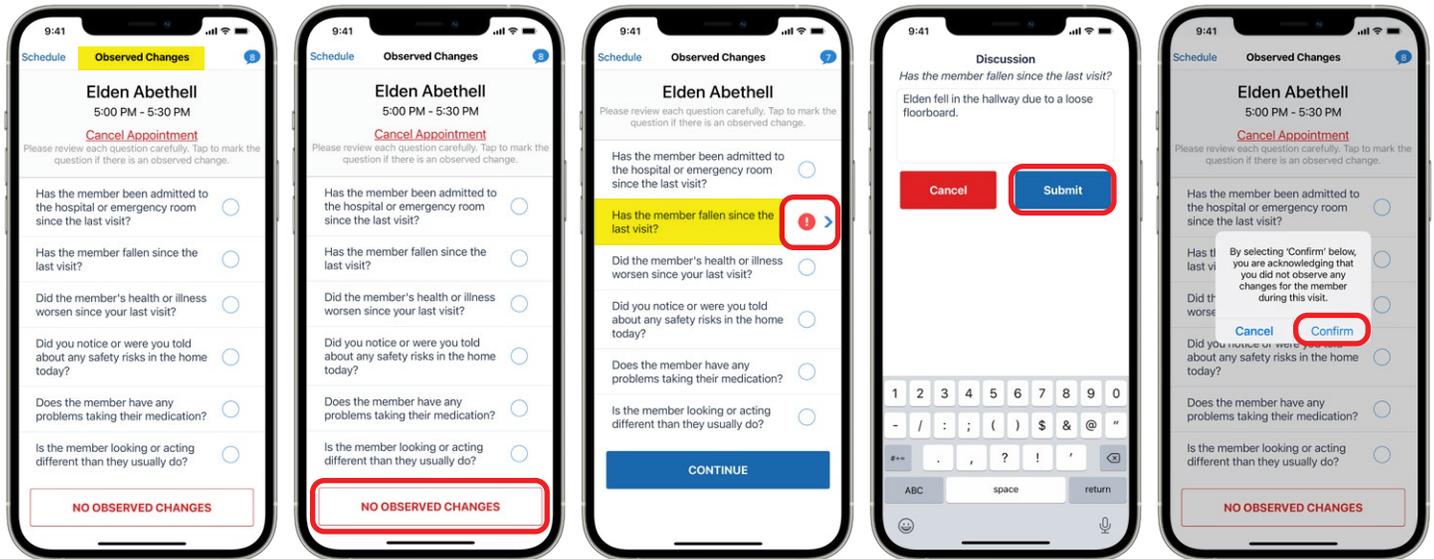
OBSERVED CHANGES

Once the caregiver has *finished working their visit*, they will go back to the Mobile App (it will pick up where they left off) and continue the documenting process. If they noticed any changes in the member's health since their last visit, they can document them in 'Observed Changes'.
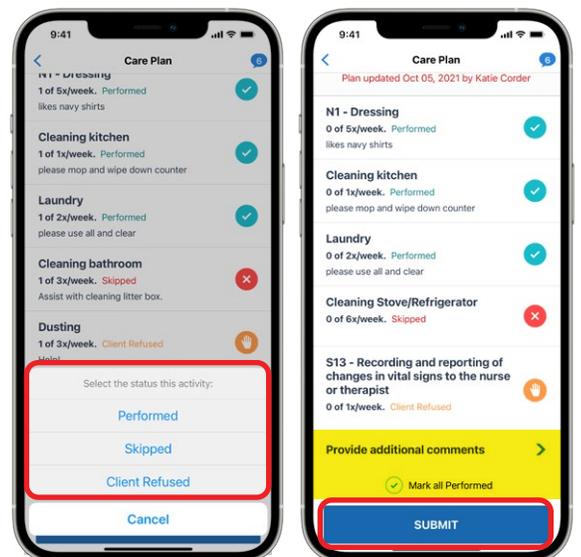
Figure 5. Observed Changes

The caregiver must review each question and check any that apply (where the answer is 'Yes'), click the **>** sign to add comments and then **SUBMIT** (Figure 5). After they have reviewed all the questions, they can click **CONTINUE**. They will be asked to confirm that they have reviewed all the Observed Changes questions. If there are no changes, the caregiver can click **NO OBSERVED CHANGES** then **Confirm**.

NOTE: All urgent issues need to be reported to WDH via the required incident reporting process already in place.

(EVV) CARE PLAN

Figure 6. Track (EVV) Care Plan progress

After Observed Changes, the caregiver will see the member's (EVV) 'Care Plan'. The (EVV) Care Plan activities should be completed at the end of the visit before the caregiver checks out. In the (EVV) Care Plan, they can either **Mark all Performed** or choose each task individually and mark them either **Performed**, **Skipped**, or **Client** (Member) **Refused** (Figure 6). If the caregiver chooses to mark the tasks individually, they can make comments as needed and then **SUBMIT** and continue. The caregiver can always update any individual responses before clicking **SUBMIT**. They can also see the frequency for each task and track how many tasks have been completed.

CHECKING-OUT OF A VISIT

After completing the(EVV) Care Plan, the caregiver will see the **CHECK OUT** screen (Figure 7) along with the completed Observed Changes questions and (EVV) Care Plan tasks. After reviewing, they can click the **Collect Signature** button. Once the member signs, the caregiver can click **APPROVE**. If a member doesn't sign, the signature can be skipped by clicking **APPROVE** and selecting **Member Refused** or (if it's available in WY) **Member Unable**. The visit has then been completed and the app will return to the appointment screen (Figure 8).
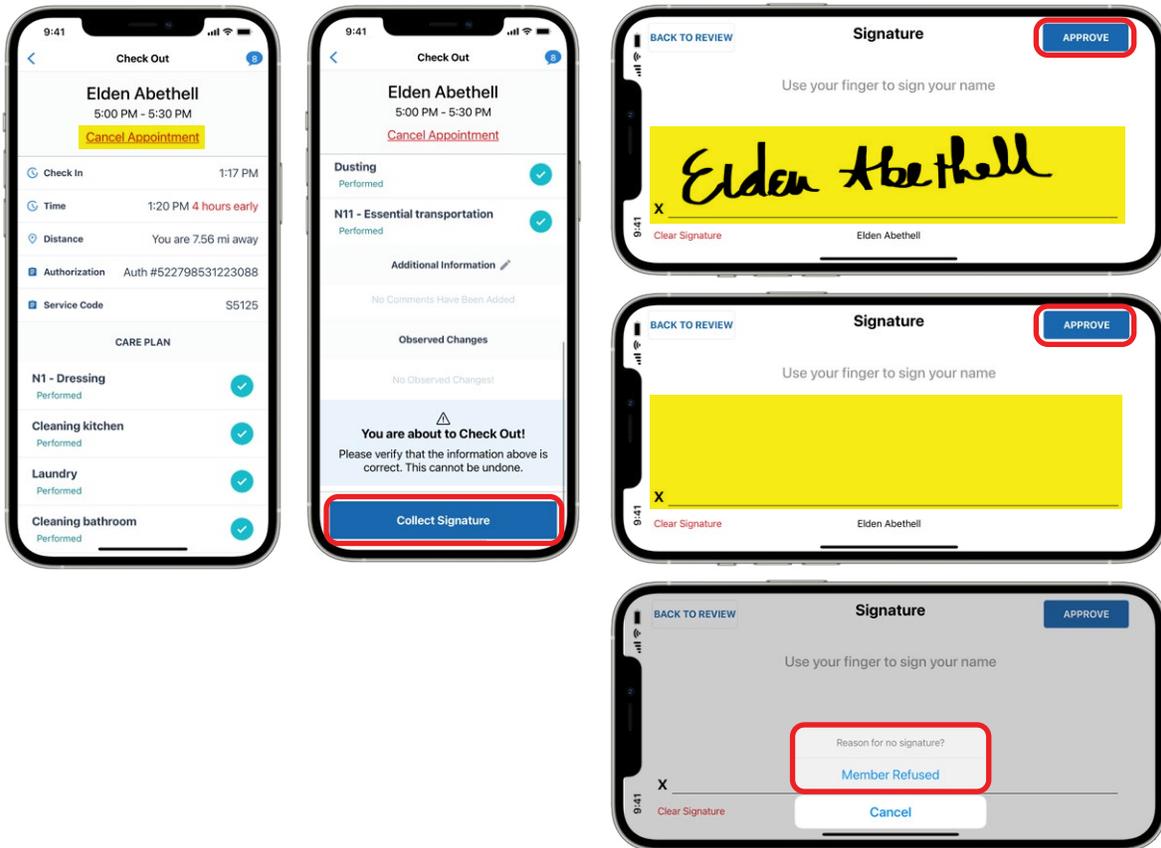
Figure 7. Checking Out of a visit

STILL NEED HELP?

Many of the caregiver's questions can be addressed by the provider organization's portal administrator. These include things like:

- Username/password issues
- Appointments
- Scheduling
- Missed visits

For technical questions about the CareBridge solution and how it functions, the CareBridge Technical Support team is happy to help. The caregiver or their administrator can contact us via email: **wyevv@carebridgehealth.com** or call us at **1 (855) 912-3301**.

Figure 8. Checked Out