

Mobile Caregiver+ Mobile Application User Guide

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Terminology

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

- **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 EVV 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 Administrator Role and the Caregiver Role.

- **Caregiver:** A limited Mobile Caregiver+ User Role that allow Users to download, install, and 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 Administrators for Caregivers to provide services to Recipients. Caregivers may need to schedule a visit when a new service is required over a weekend, for example, when an administrator 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.

Getting Started

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Mobile Caregiver+ Overview

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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.

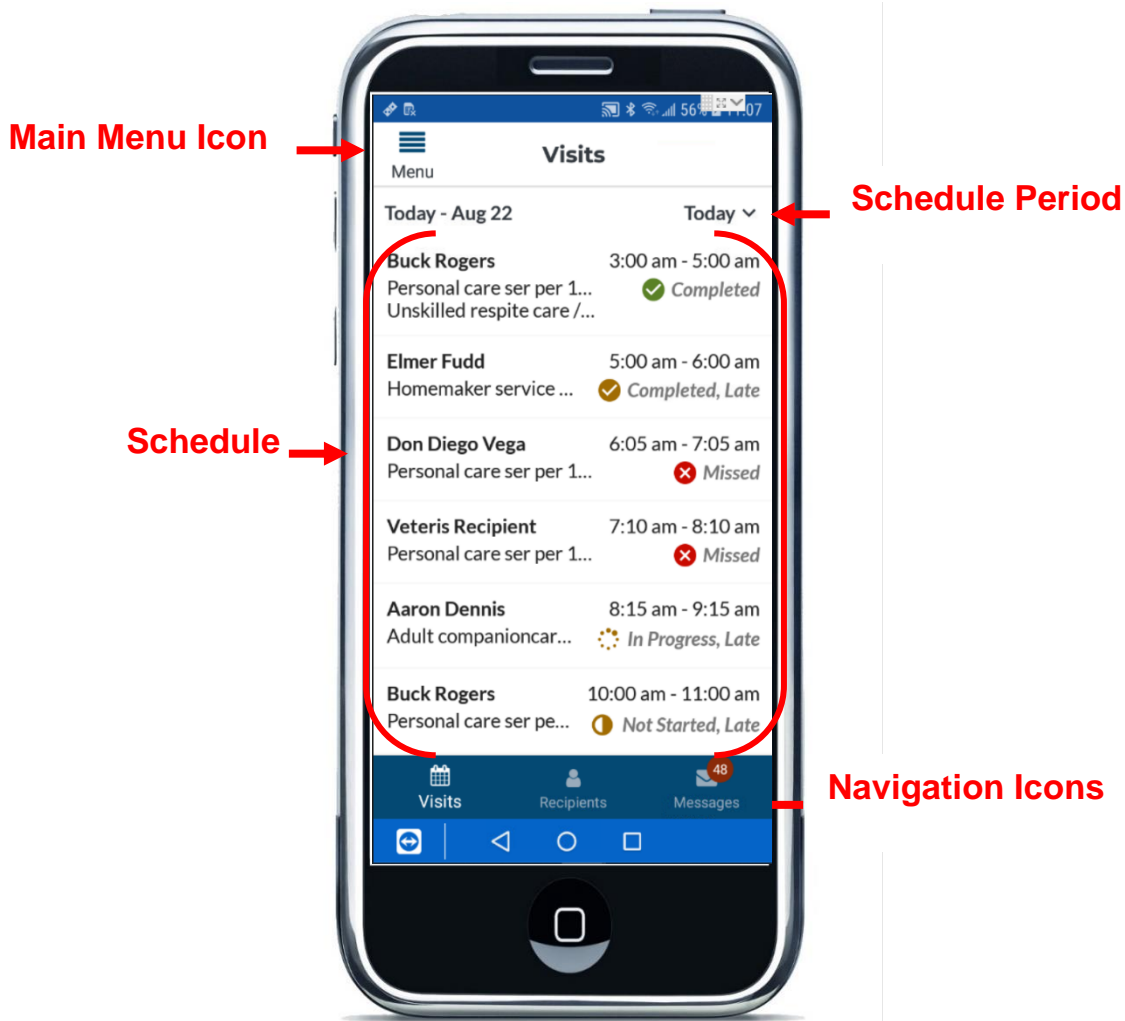
The Mobile Caregiver+ App:

- 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 that let you request a password change, get help, view provider agencies, update your profile, choose the display language for the app, choose face or fingerprint ID if your device offers it, and log out.
- **Schedule period dropdown:** Located in the top 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 icons at the bottom of the screen** organize data and provide access to various pieces of information:
 - **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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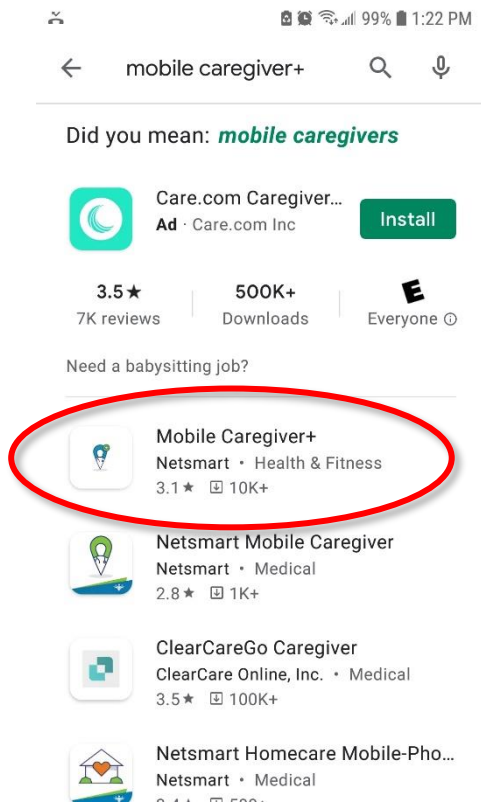
Installing Mobile Caregiver+

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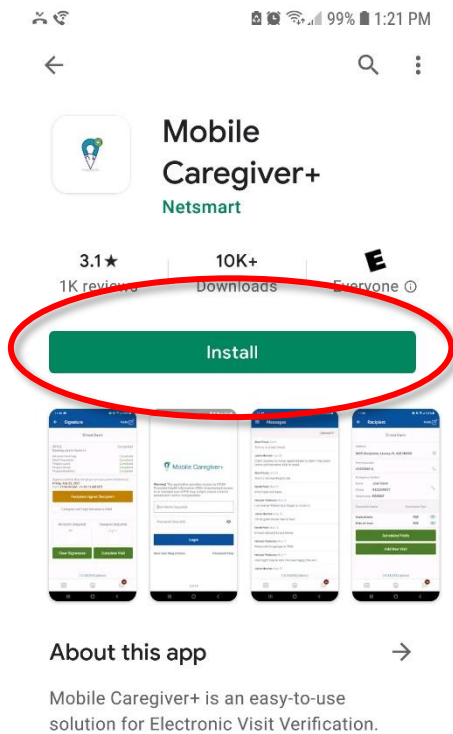
The Mobile Caregiver+ application can be downloaded via the app stores available on any smart mobile device.

Android

1. On your Android device, locate the Play Store.
2. Open the Play Store app.
3. Search, or browse, for **Mobile Caregiver+**.
4. Select the Mobile Caregiver+ app.

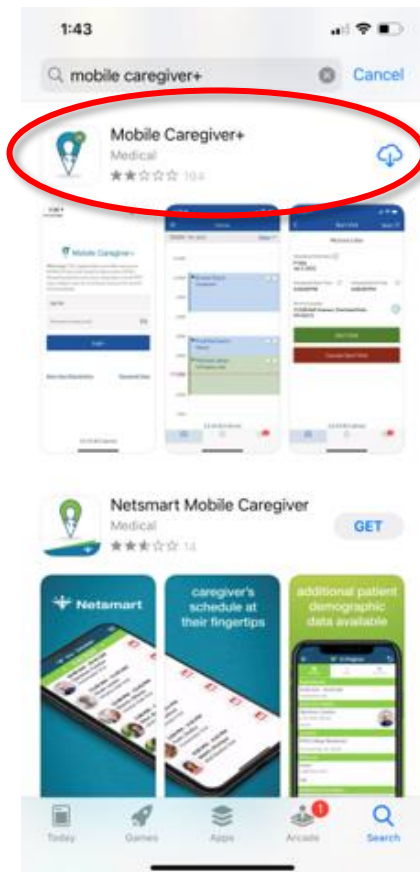


5. Tap Install.



Apple iOS

1. On your iPhone, iPad, or iPod Touch, locate the Apple App Store.
2. Search, or browse, for **Mobile Caregiver+**.
3. Select the Mobile Caregiver+ app.
4. Tap **Get** on the right side of the screen, then follow the instructions to **Install**.



If prompted, enter your Apple login credentials.

Related Topics

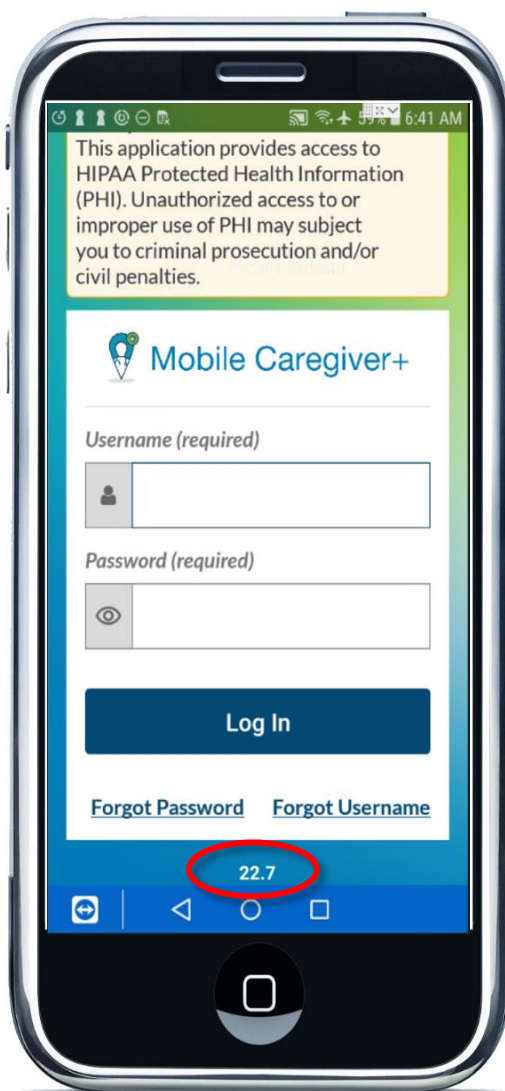
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Updating your App

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Netsmart regularly releases updates to the Mobile Caregiver+ application. Best practice recommendation is that Users should update the application to the most current version.

To confirm the version of the Mobile Caregiver+ software on your smart device, open the Mobile Caregiver+ 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.

Updating Mobile Caregiver+ on an Android Device

1. On your Android device, go to Play Store.
2. Search for the Mobile Caregiver+ app.
3. If an update is available, tap Update.

Updating Mobile Caregiver+ on an Apple Device

1. On your Apple device, go to the App Store.
2. Search for the Mobile Caregiver+ app.
3. If an update is available, tap Update.

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

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Logging In

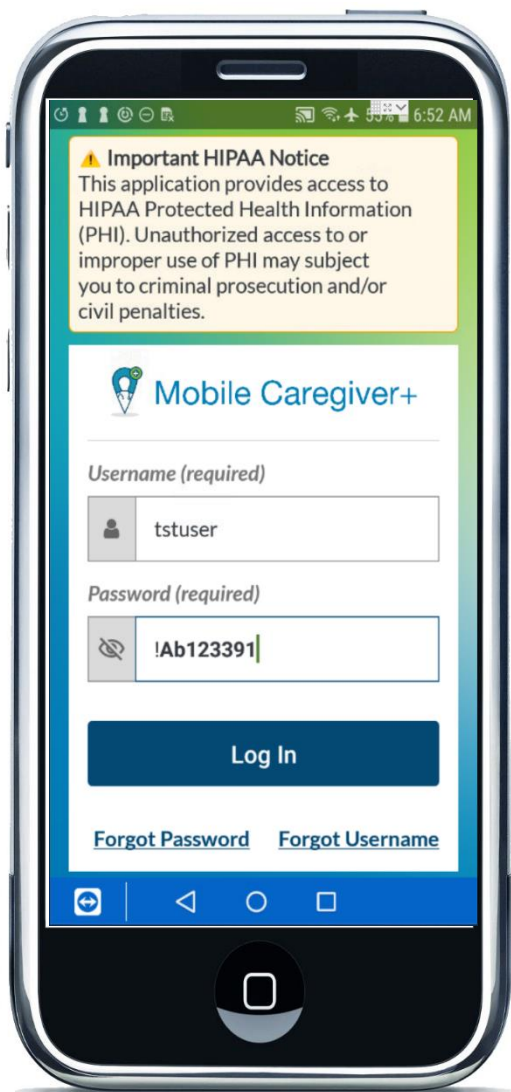
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New users and users that reset their passwords, will receive an email with their login credential. Users will receive a temporary password and must login within 36 hours from the time the email invitation was sent; the password will expire after 36 hours.

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


To log into Mobile Caregiver+:

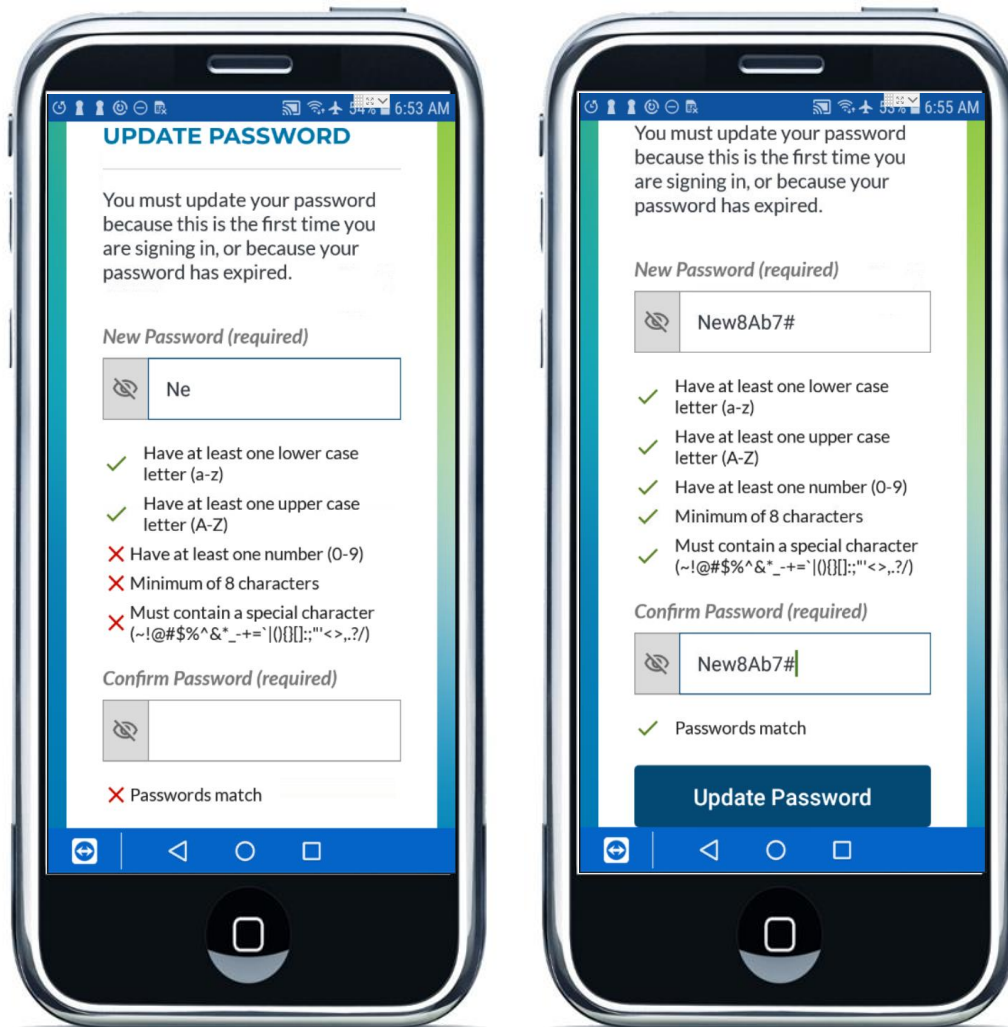
1. Tap the Mobile Caregiver+ icon to launch Mobile Caregiver+.
2. Enter your Username.
3. Enter your temporary password.
4. Tap **Login**.



The system will display the Update Password screen, which will allow the user to update the expired password.

5. From the **Update Password** screen, enter your new password in the **New Password** field.
6. Confirm and re-enter the new password in the **Confirm Password** field.
7. Tap Update Password

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



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.

The system will initially display a red “X” 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.

TIP: Please do not write your password down where it 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.

Related Topics

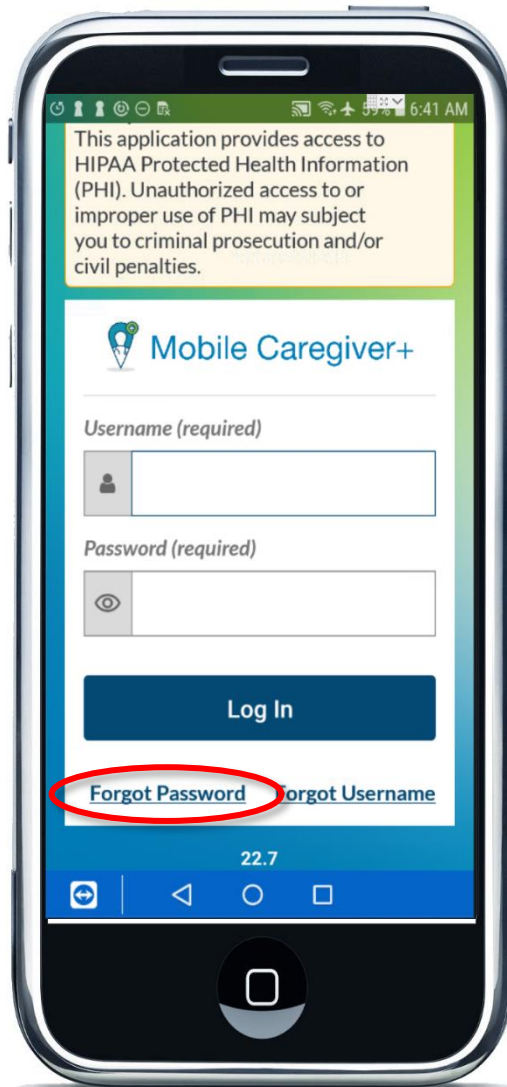
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Resetting Forgotten Password

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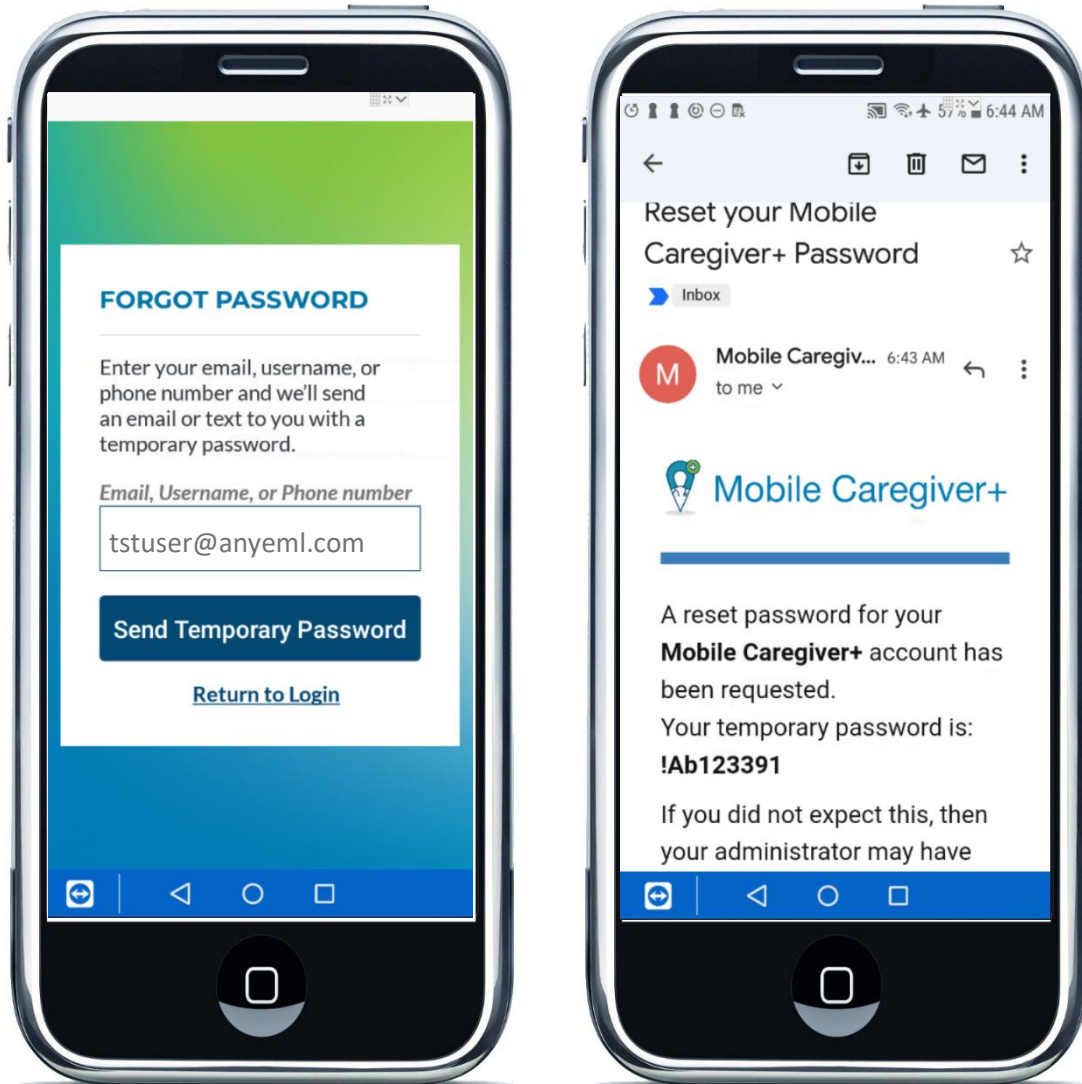
If you forget your password, you can reset it from the Mobile Caregiver+ Login screen:

1. From the Mobile Caregiver+ mobile application Login screen, Tap **Forgot Password**.



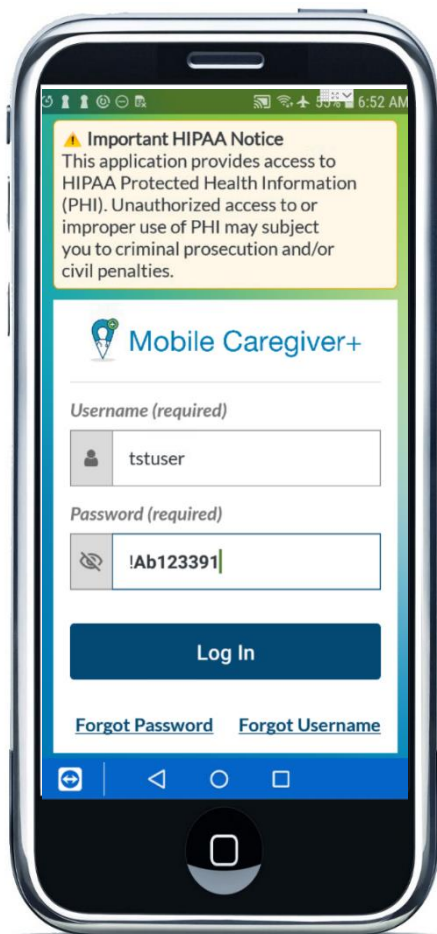
2. Enter the unique email address, Username, or phone number listed in your Mobile Caregiver+ User profile.

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. This temporary password is valid for 36 hours; if you do not change your password within that time, you will need to reset your password again.

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 User ID.
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.

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

TIP: *Please do not write your password down where it is accessible to others, rather memorize your password to keep it private.*

Related Topics

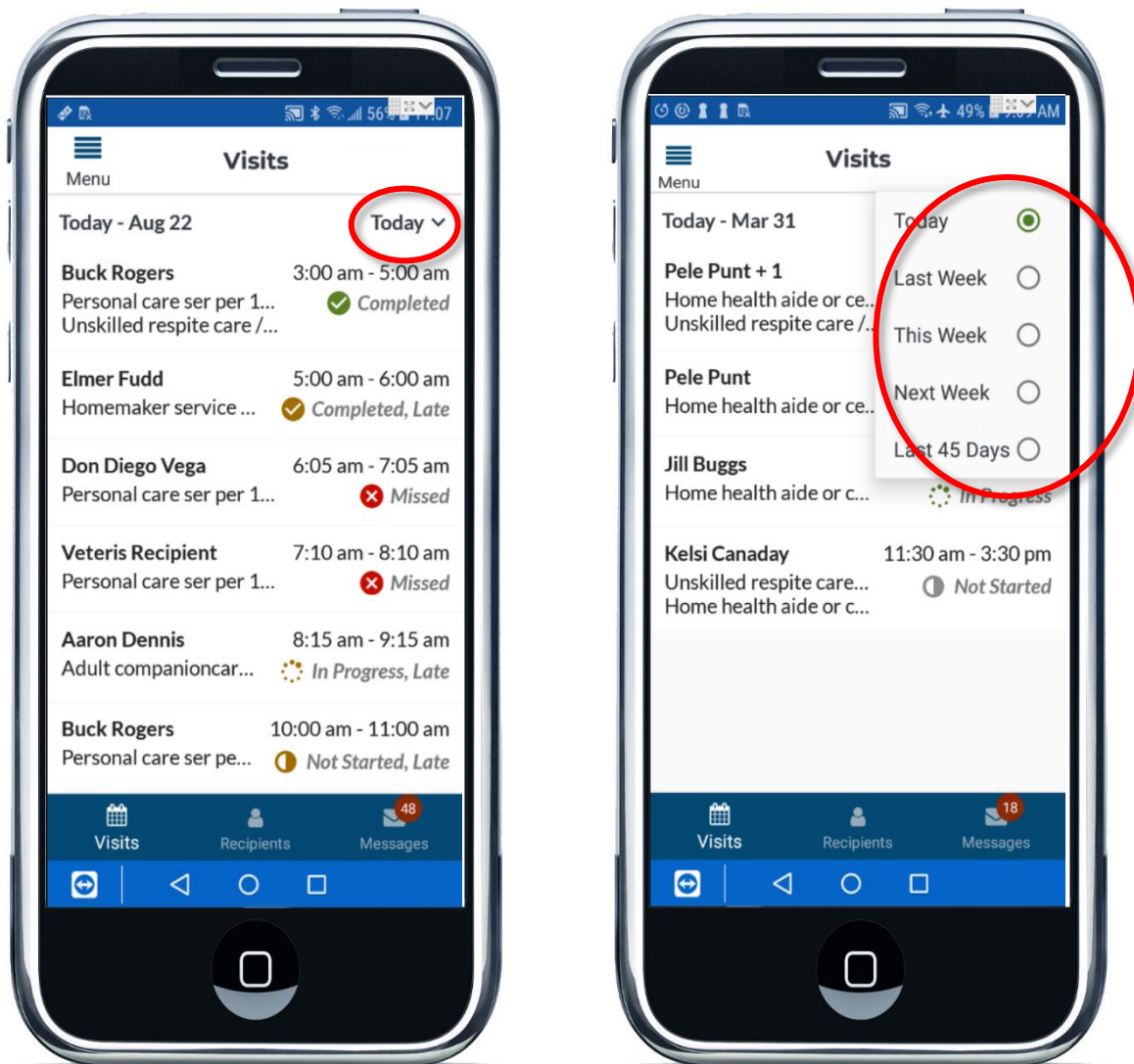
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The Visits Screen

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When you log in to the Mobile Caregiver+ 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**.



The **Home** screen will display the schedule for the time-period you select.

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

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

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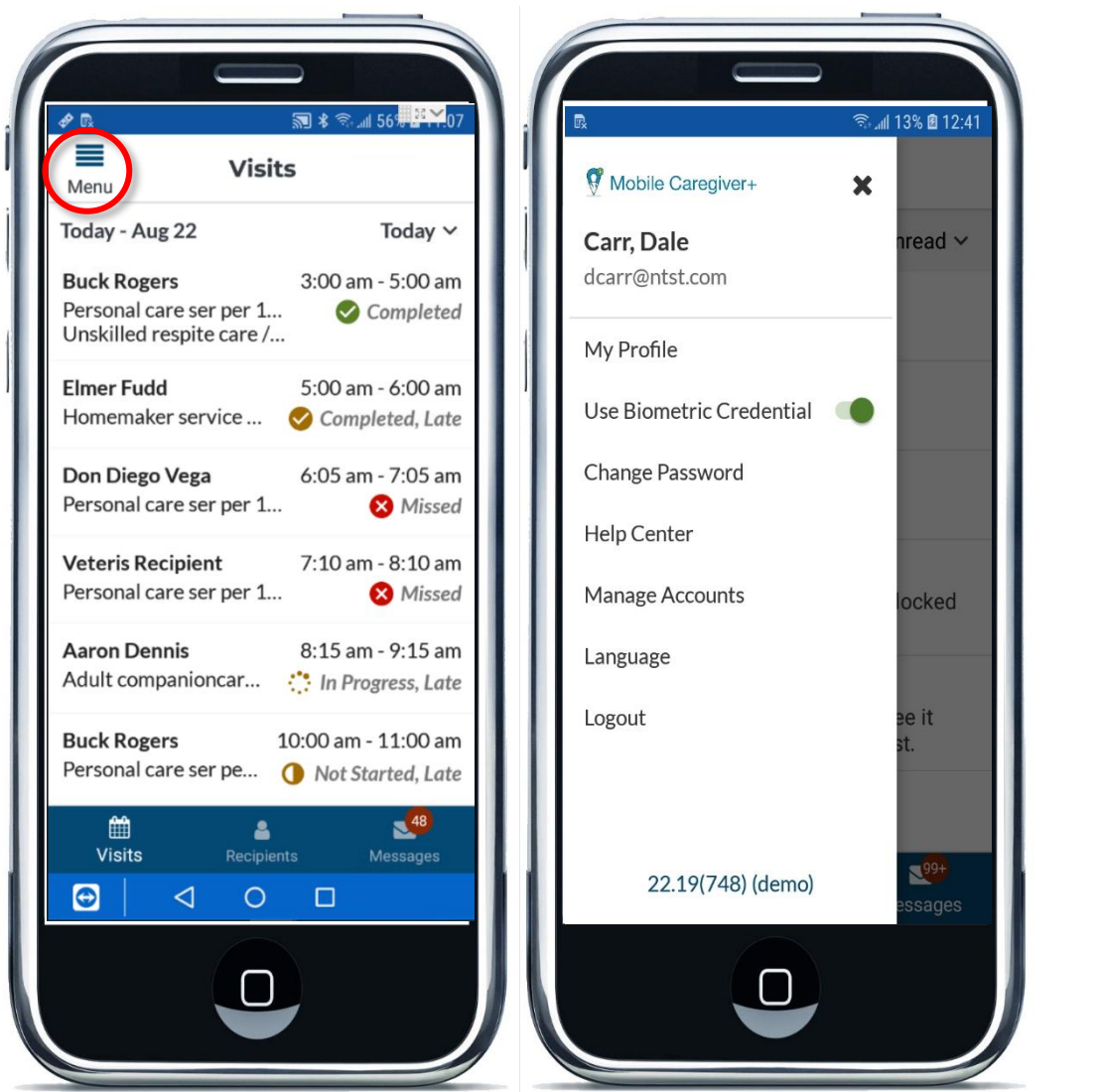
Accessing the Main Menu

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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**:



- [***My Profile***](#), displays and allow 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+. This function is available only on devices which have fingerprint ID or face ID capabilities. Turn on biometric authentication by taping 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, least 1 upper case letter, 1 lower case letter, 1 number, and 1 special character.
- [***Help Center***](#) provides access to phone support.
- [***Manage Accounts***](#), 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.
- [***Logout***](#) allows you to log out of the app.

Related Topics

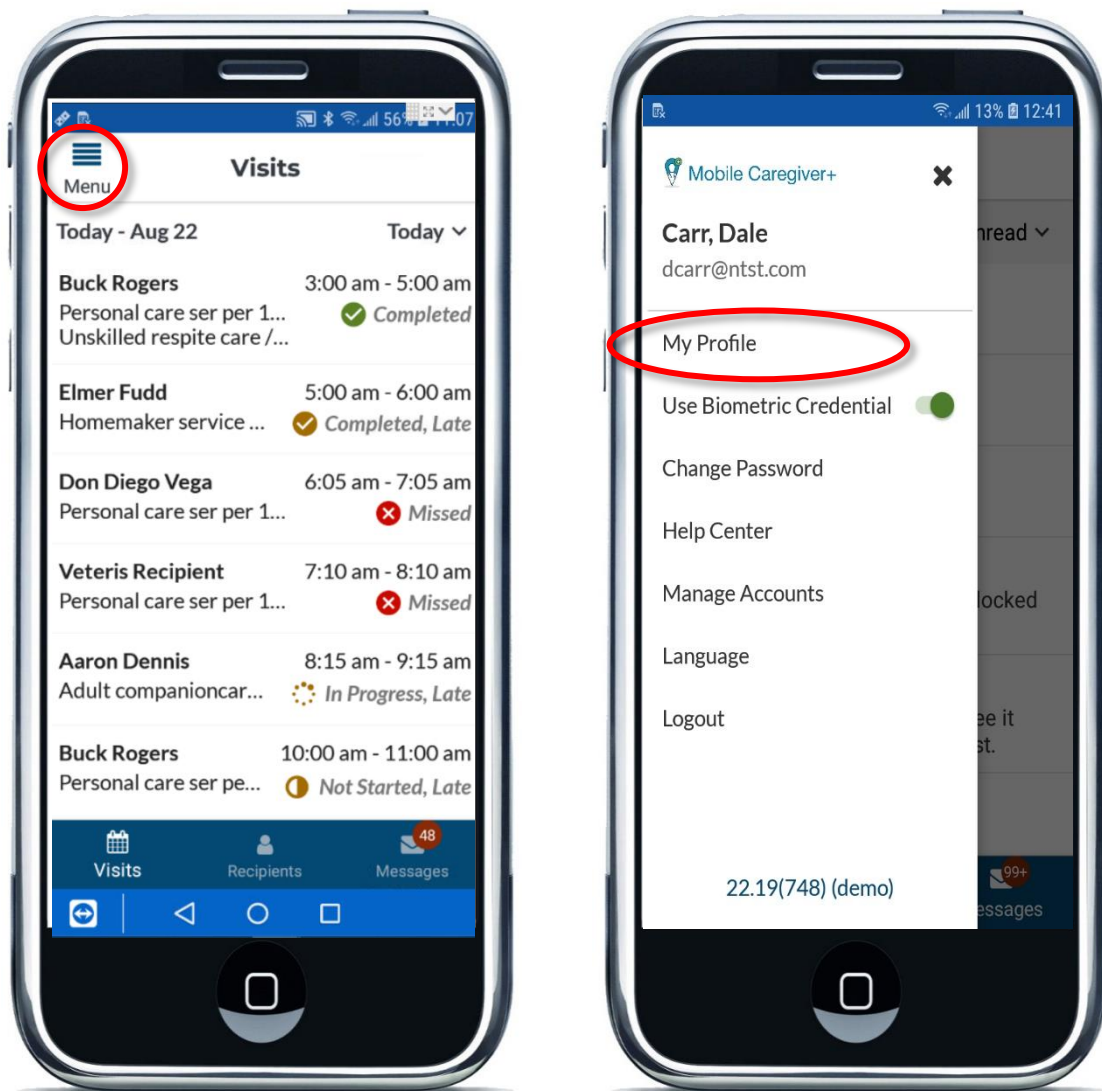
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Managing Your Profile

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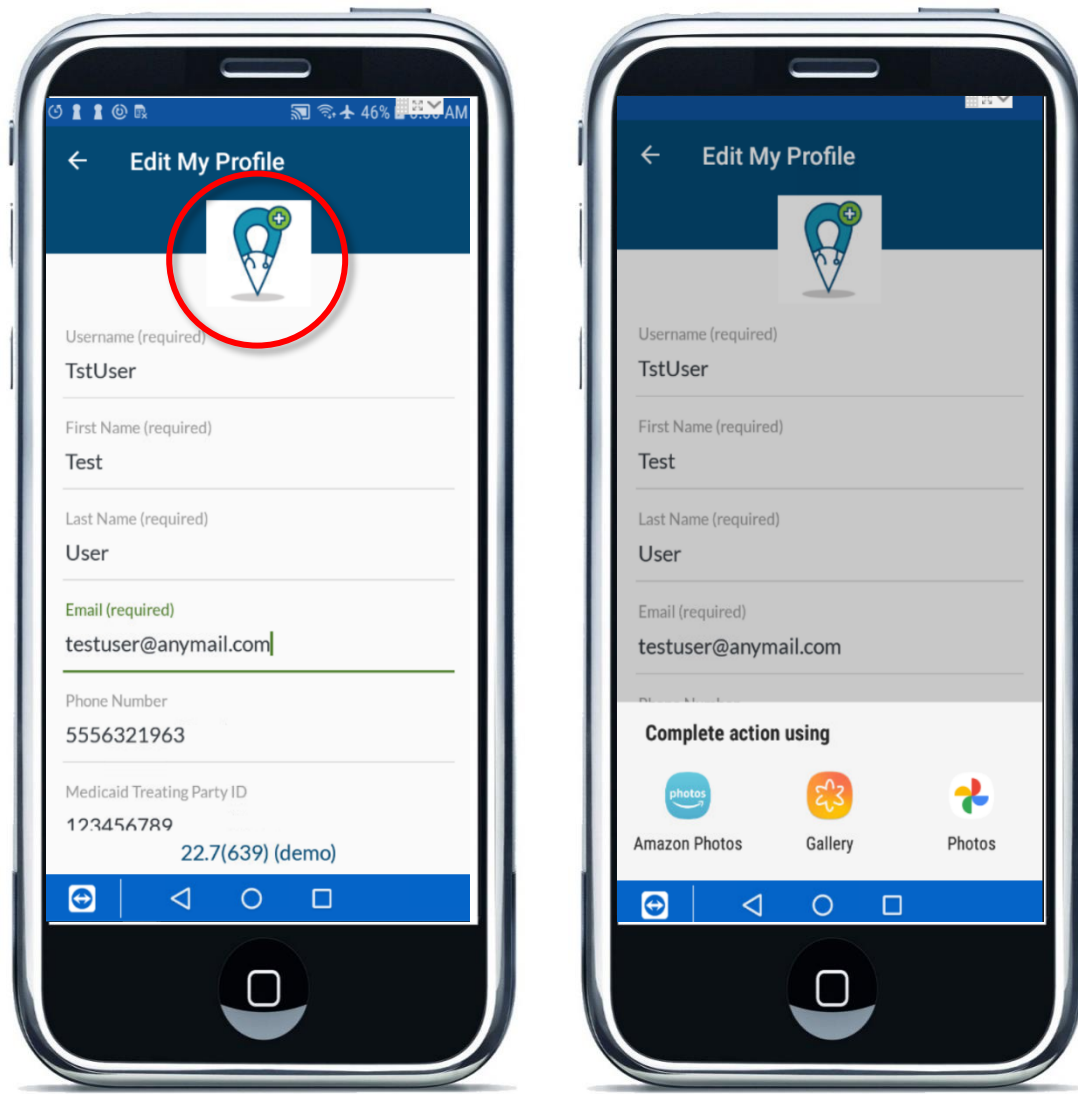
You can update your Mobile Caregiver+ User Profile from the Main Menu. Follow these steps to update your profile:

1. Tap the **Main Menu** icon, in the upper left-hand corner of the screen.
2. Tap My Profile.



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

3. Add an option user icon photo: Tap the Mobile Caregiver+ icon and either take a new picture or select from your existing photos.



4. The following information should have been entered when your account was created; you can edit any of the following fields, if needed.
 - **Username:** **WARNING** – do not change your Username.
 - **First Name** and **Last Name** can both be changed.

- **Email:** Update your email address if needed. Remember, the combination of email and phone number must be unique for each user, so do not use a generic corporate email address.
- **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.
5. The following information was *not* requested during registration, but some fields are required (marked with *):
- **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.
6. When you finish, tap **Save** at the bottom of the screen.

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Biometric Credential Set-Up

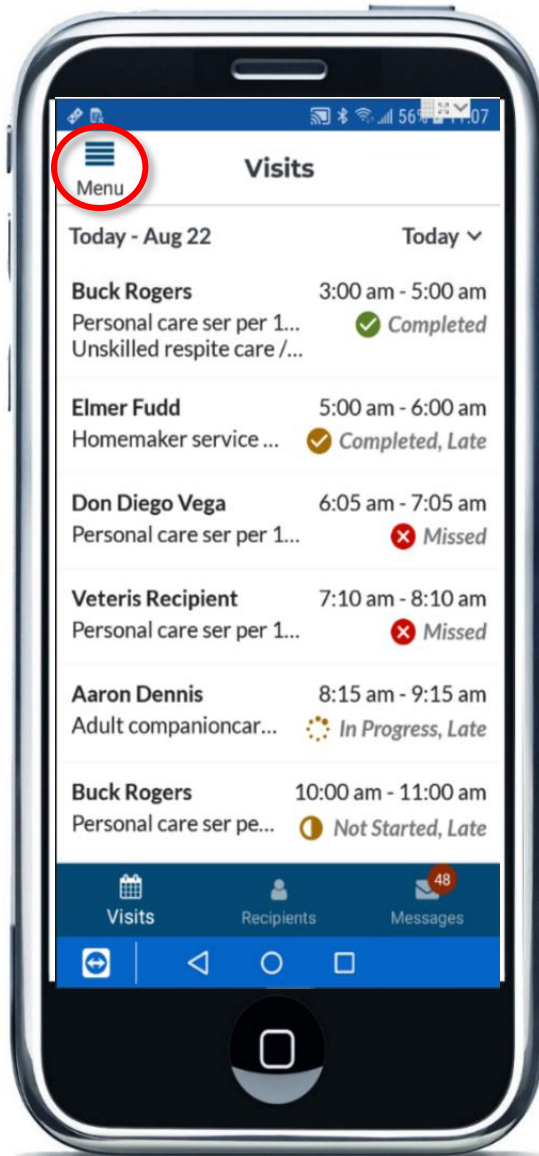
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Once you have logged into the application, you will remain logged in until you log out of the app; however, the app will lock at any time your device goes to sleep or at any time you navigate to a different app. To unlock the Mobile Caregiver+ mobile 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.

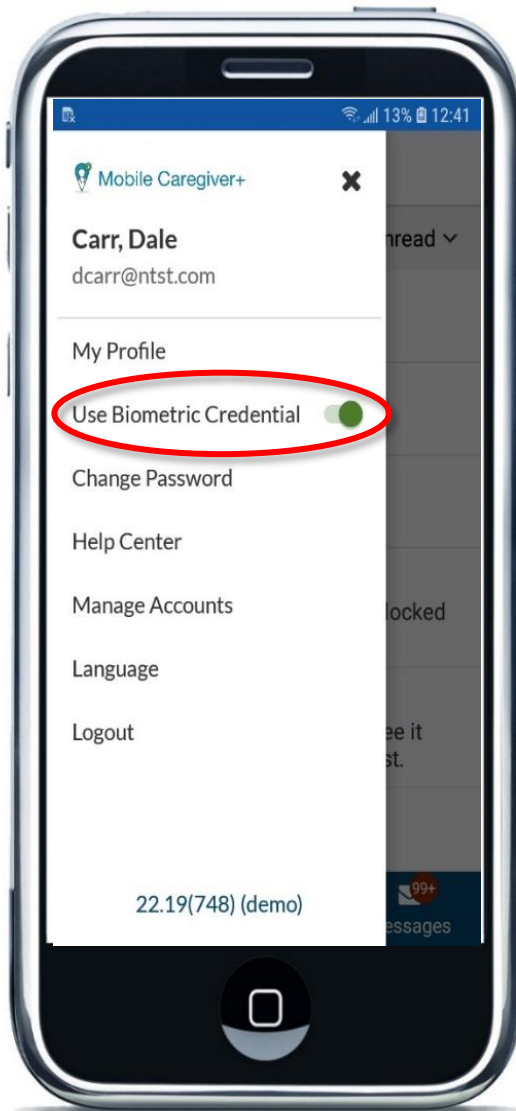
****If your device permits this function, the **biometric credential** function will be available to turn on, if your device does not permit this function, you will not have the ability to enable the function.****

To enable the biometric credential function:

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



2. From the Main Menu, tap the **Use Biometric Credential** switch.



If activated, the switch will turn green. If it is not activated, it will be grey.

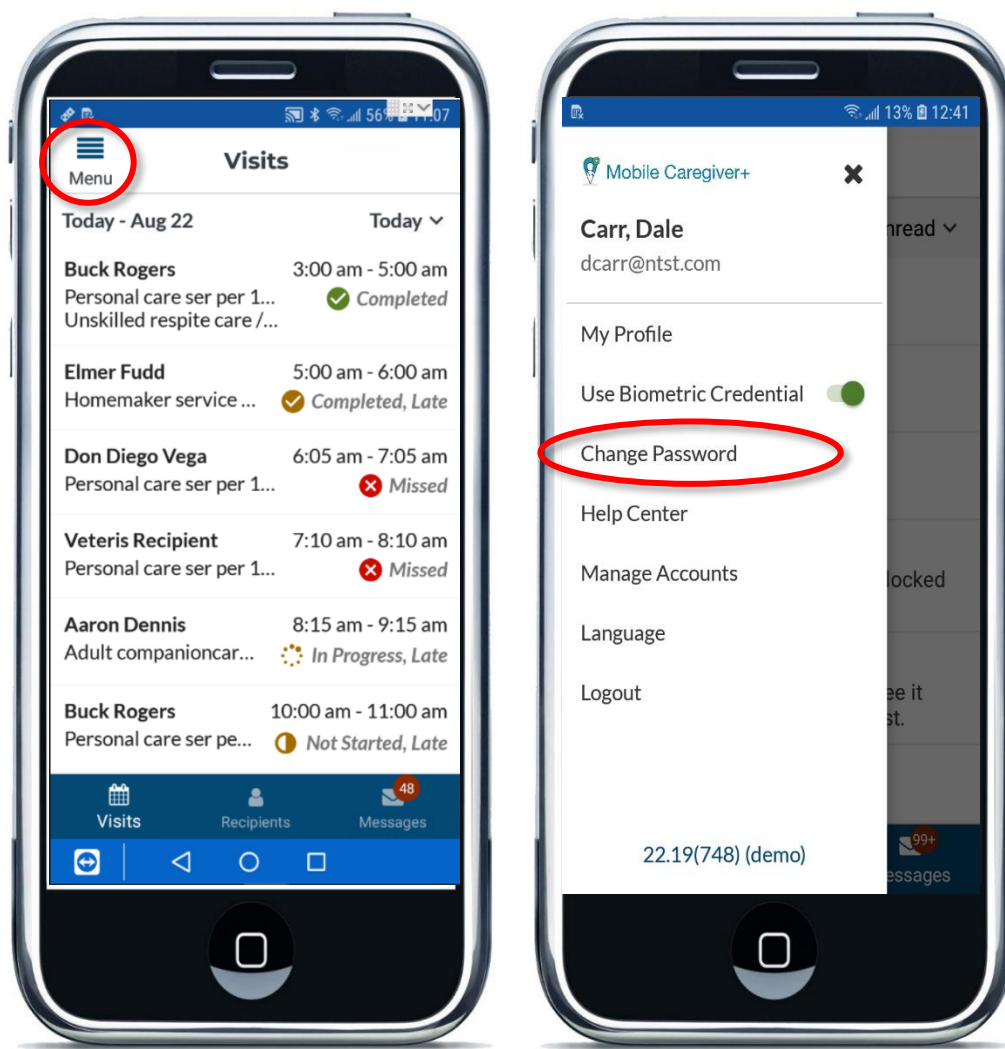
****Once the biometric authentication has been enabled and once the app locks, the next time you attempt to reactivate the mobile app, you will be prompted to scan your fingerprint or face ID to unlock the session.****

Changing Your Password

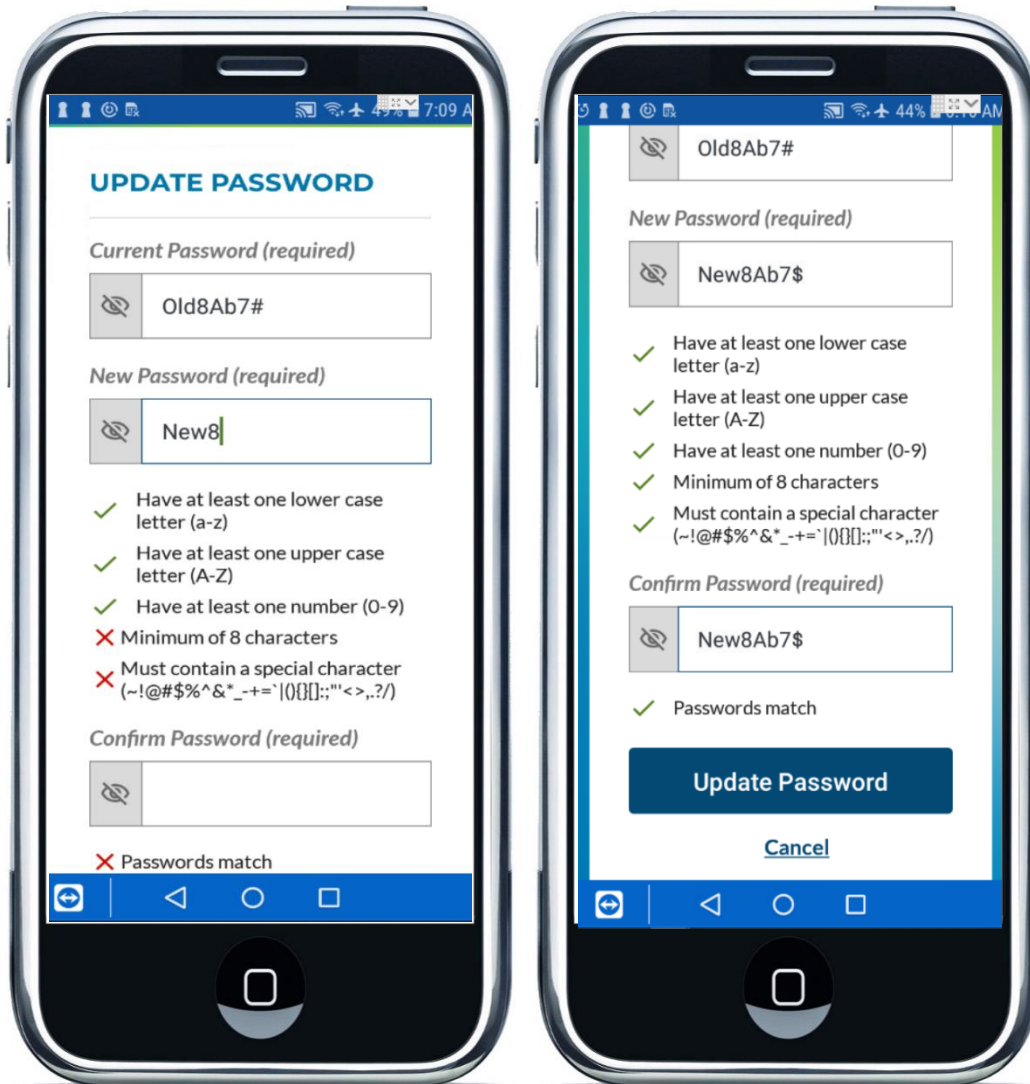
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To avoid passwords from being expired, users may proactively reset their password. You can reset your password by following the steps below:

1. Log in to the Mobile Caregiver+ mobile application.
2. From the Main Menu, tap the **Main Menu** icon in the upper left-hand corner of the screen.
3. Tap Change Password.



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



Related Topics

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

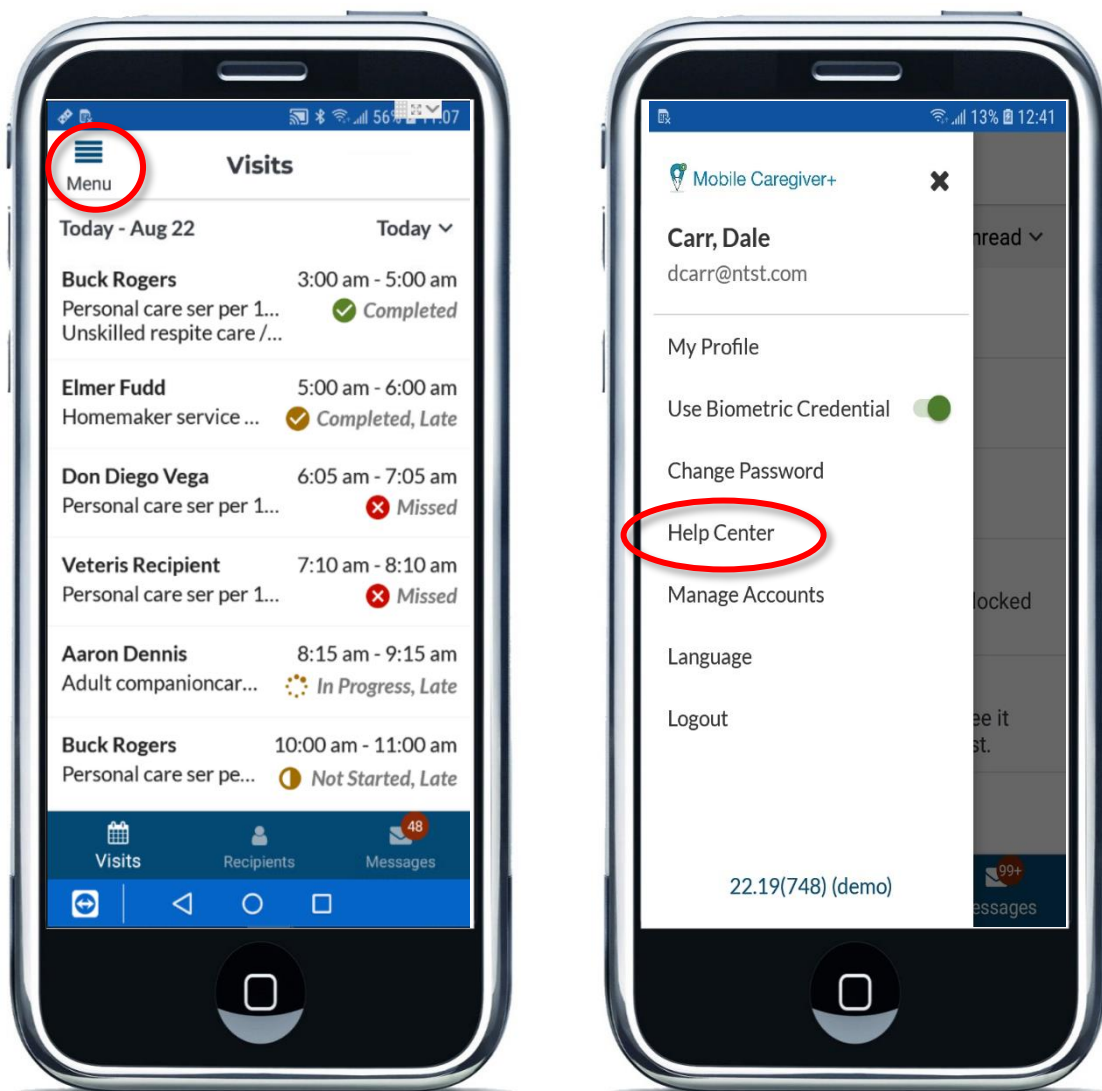
- [Changing your Password](#)
- [Changing the Time Period View on the Home Page](#)
- [Accessing Help and Support](#)
- [Viewing Active Agencies \(Accounts\)](#)
- [Managing your Profile](#)
- [Changing the Display Language](#)
- [Logging Out](#)
- [Checking Messages](#)

Accessing the Help Center

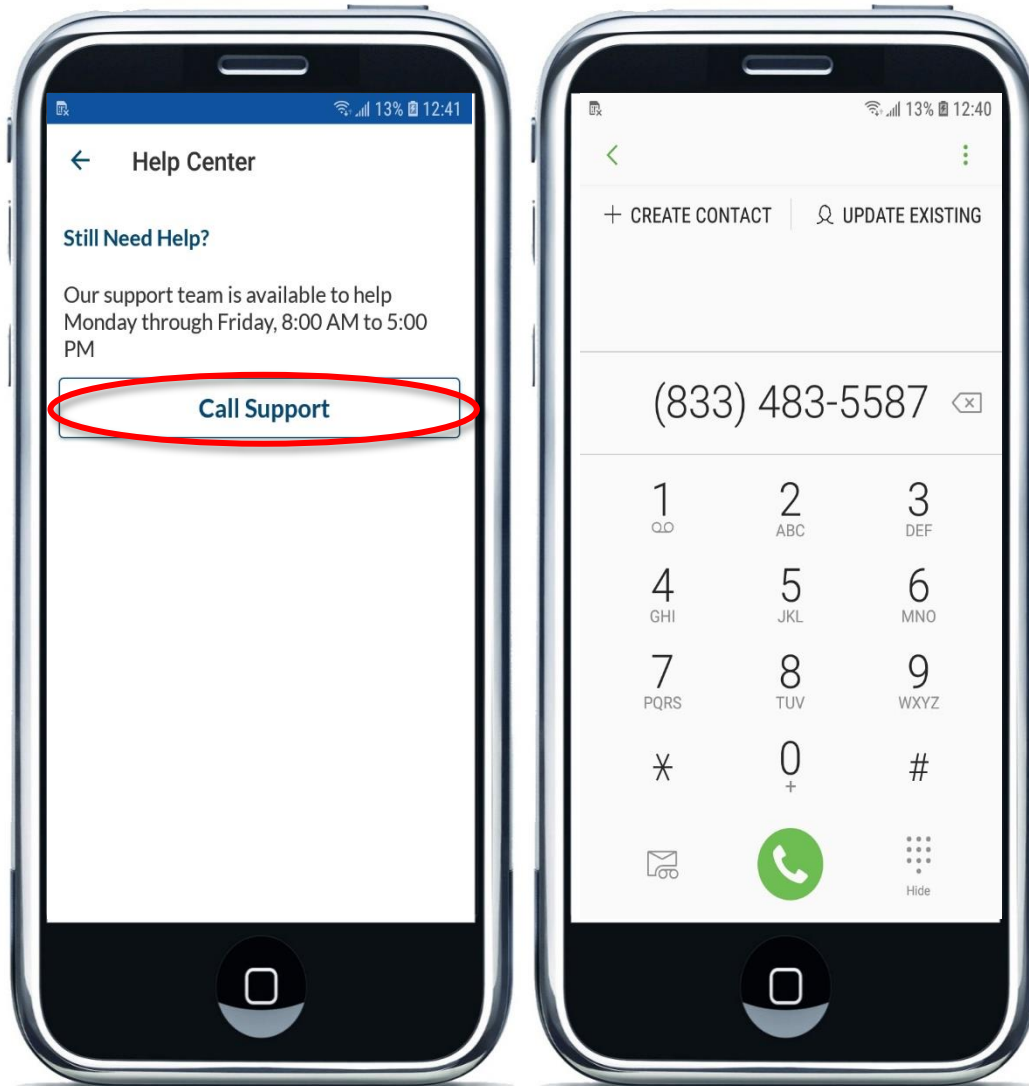
You are here: [Mobile Caregiver+](#) > [Getting Started](#) > [Accessing the Help Center](#)

To access the Help Center:

1. Tap the **Main Menu** icon in the upper left-hand corner of any screen to open the menu.
2. Tap Help Center.



3. Tap **Call Support** to contact to a Customer Support Representative.



1. You will be redirected to your Dialpad, where you can directly call the listed number.

Related Topics

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

- [Accessing the Main Menu](#)
- [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](#)

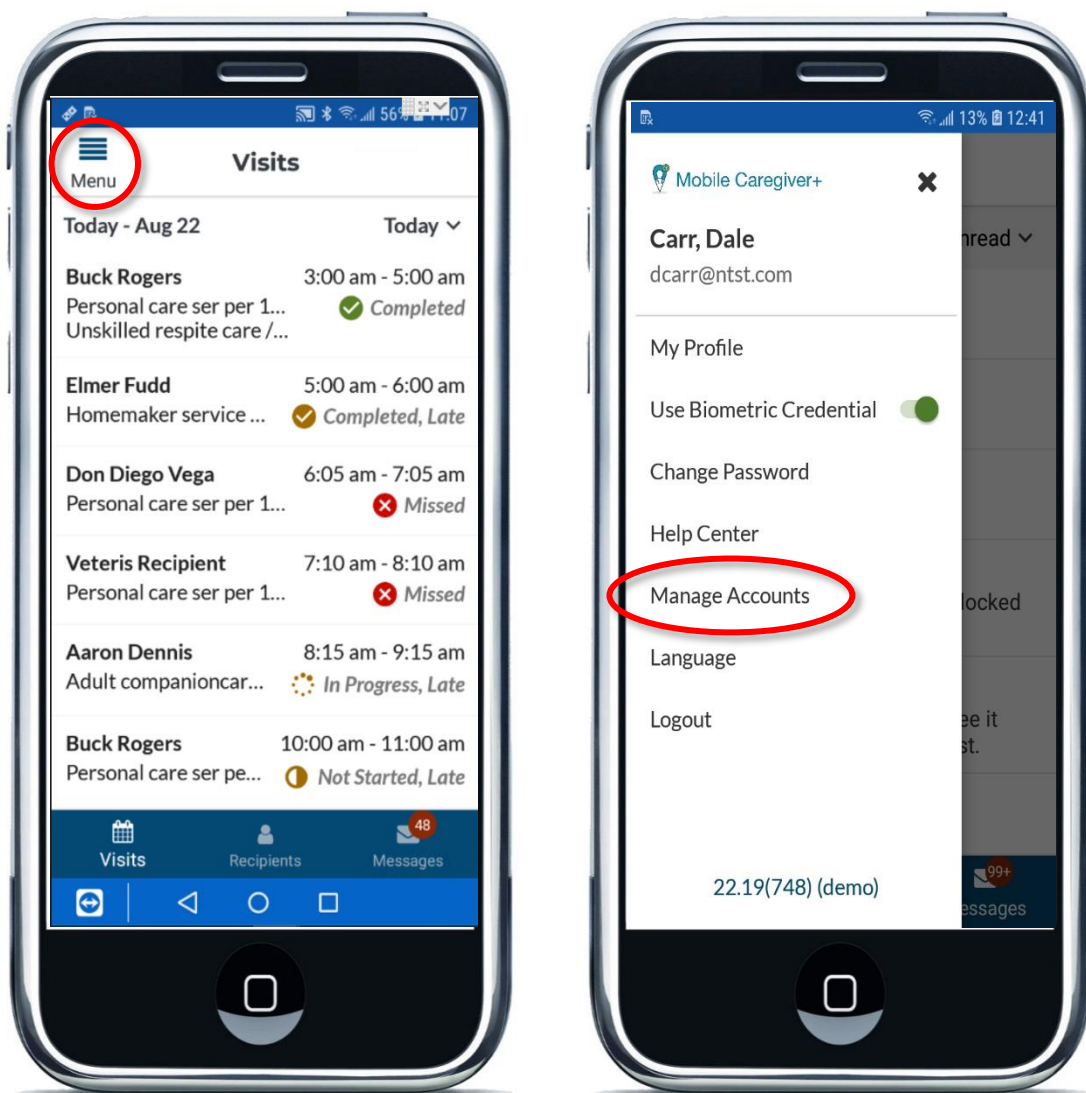
Viewing Active Agencies (Accounts)

You are here: [Mobile Caregiver+](#) > [Getting Started](#) > [Viewing Active Agencies \(Accounts\)](#)

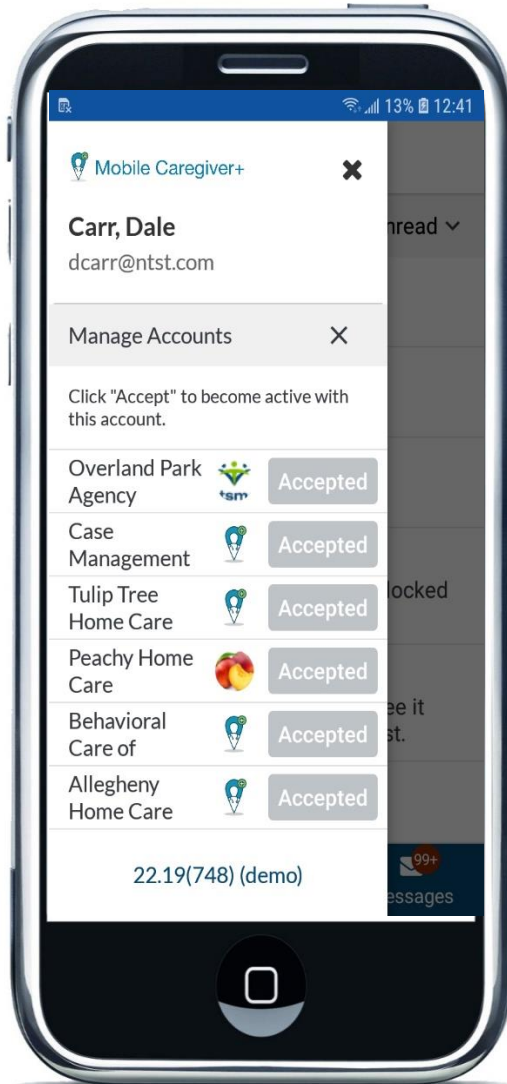
The agencies you work for are called “accounts” in Mobile Caregiver+. The Provider Admin for an agency will “invite” you to join, link to, the agency by email. When you accept an invitation, it will appear on the **Manage Accounts** screen.

To see accepted invitations:

1. Tap the **Main Menu** icon in the upper left corner of your screen.
2. Tap Manage Accounts.



The system will display all agencies, locations, that your account is currently linked to.



2.

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](#)

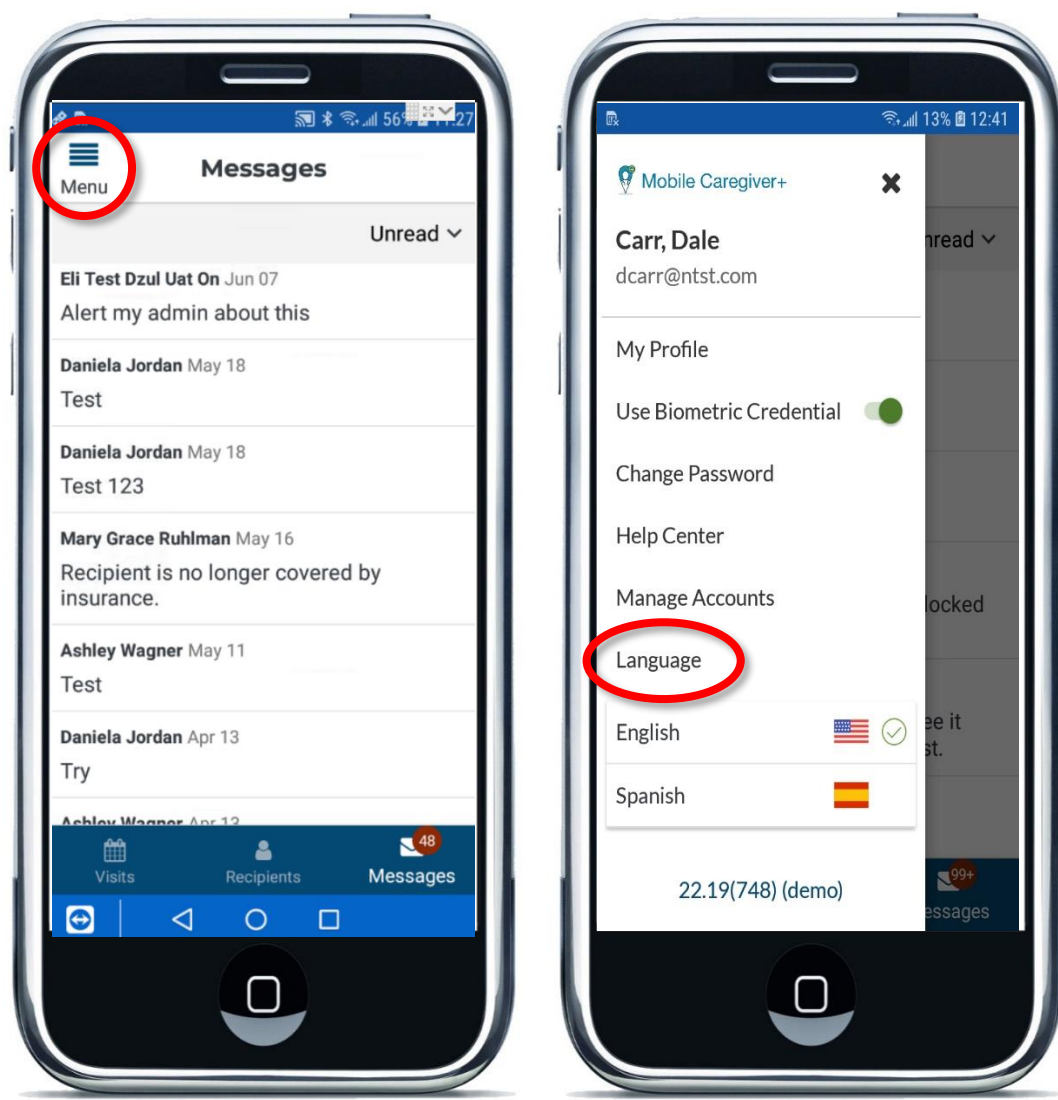
- [Checking Messages](#)
- [Logging Out](#)

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:

1. Tap the **Main Menu** icon, , in the upper left-hand corner of the screen.
2. Tap Language.
3. Select your preferred display language for the Mobile Caregiver+ mobile application.




Related Topics

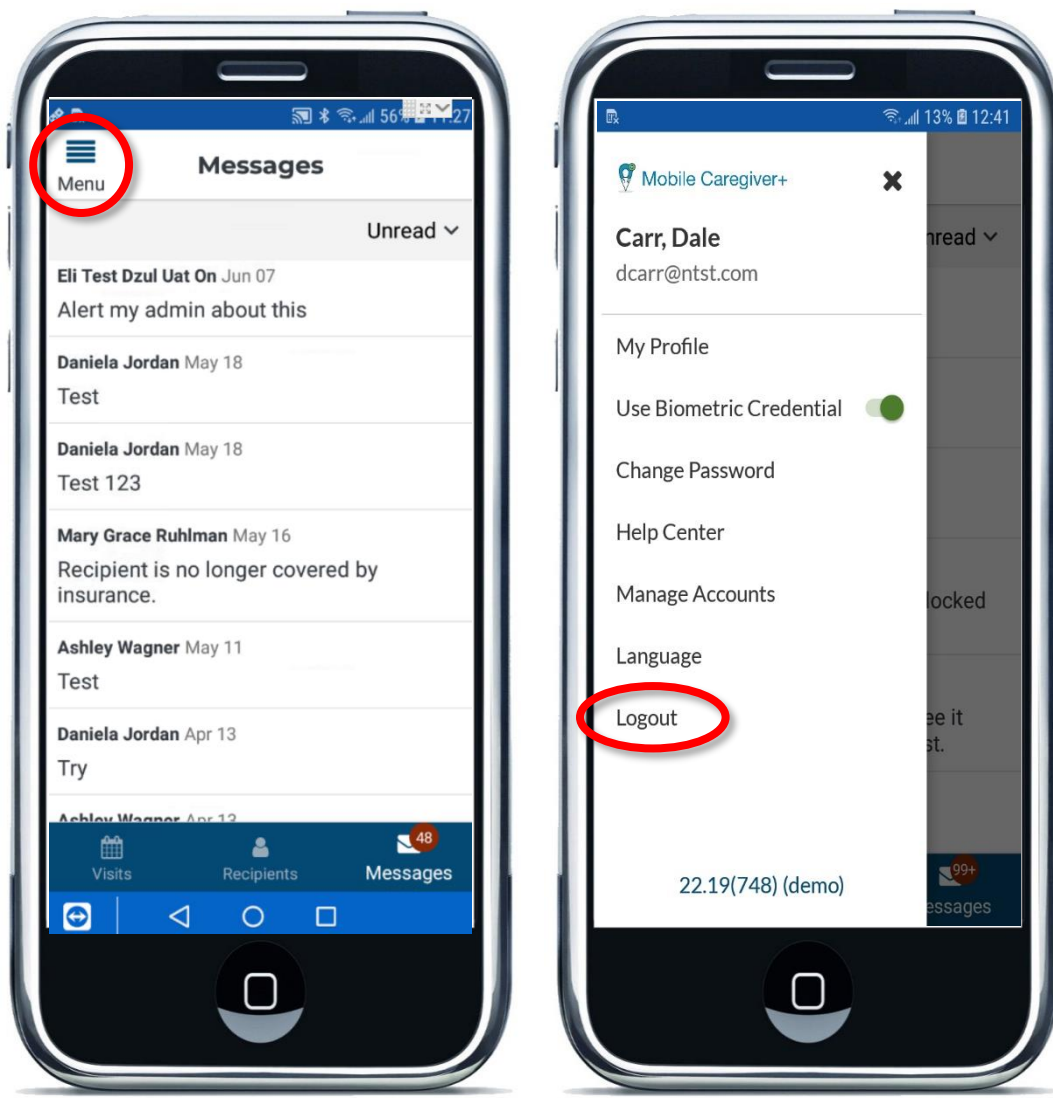
- [Mobile Caregiver+ Overview](#)
- [Installing Mobile Caregiver+](#)
- [Updating your App](#)
- [Logging In](#)
- [Forgetting your Password](#)
- [The Visits List](#)
- [Changing your Password](#)
- [Accessing the Main Menu](#)
- [Accessing Help and Support](#)
- [Viewing Active Agencies \(Accounts\)](#)
- [Managing your Profile](#)
- [Changing the Display Language](#)
- [Logging Out](#)
- [Checking Messages](#)

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:

1. Tap the **Main Menu** icon, , in the upper left-hand corner of the screen.
2. Tap **Logout**.
3. You will return to the initial log-in page.



Preparing for a Visit

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](#)

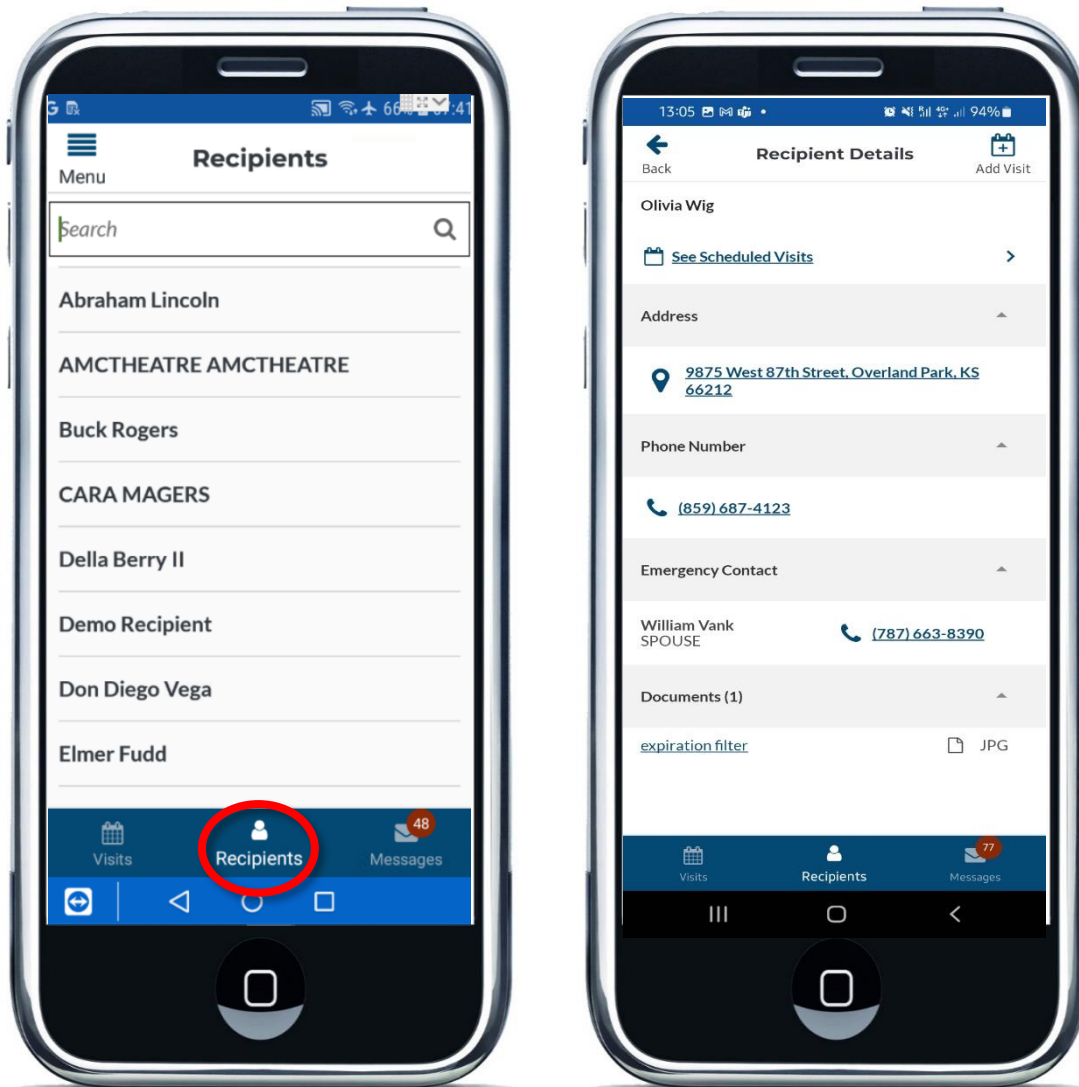
[Viewing a Recipient's Notes](#)

Viewing Recipients

You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > [Viewing Recipients](#)

To view Recipient information:

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.



5.

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.

3. The Recipient's Details screen contains the following controls:
 - [Add Visit](#) - used add, schedule, new visit for selected Recipient.
 - [Scheduled Visits](#) - displays visits scheduled for the Recipient.
 - [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 Recipients 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](#)

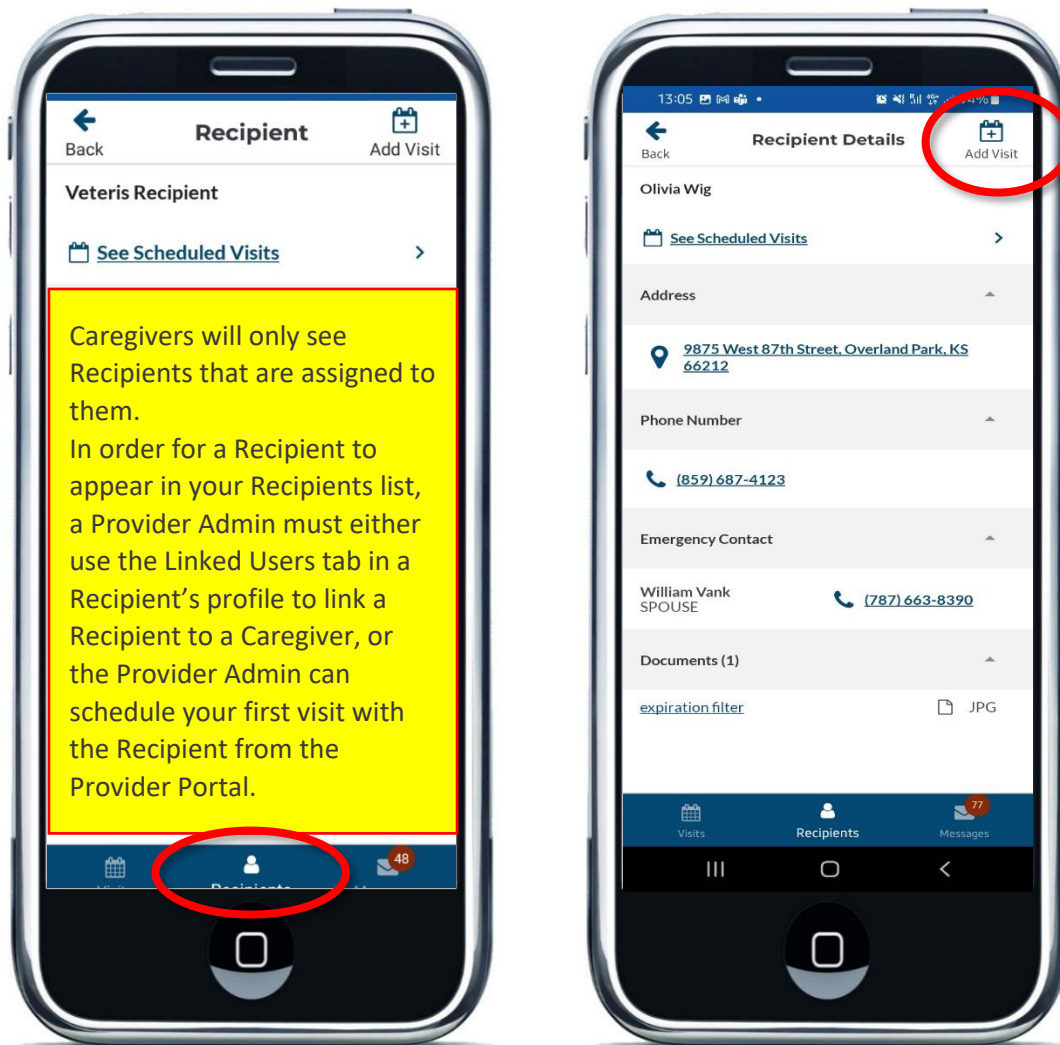
Adding/Scheduling a new Visit

You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > Adding/Scheduling a New Visit

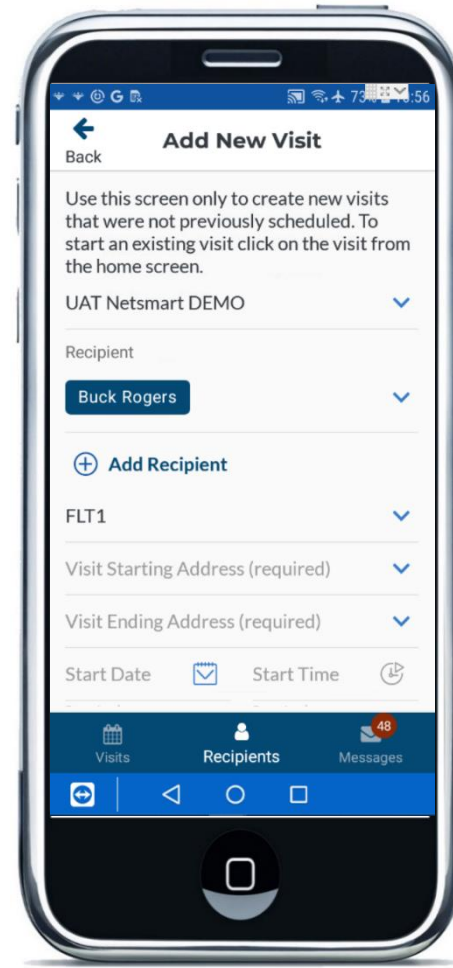
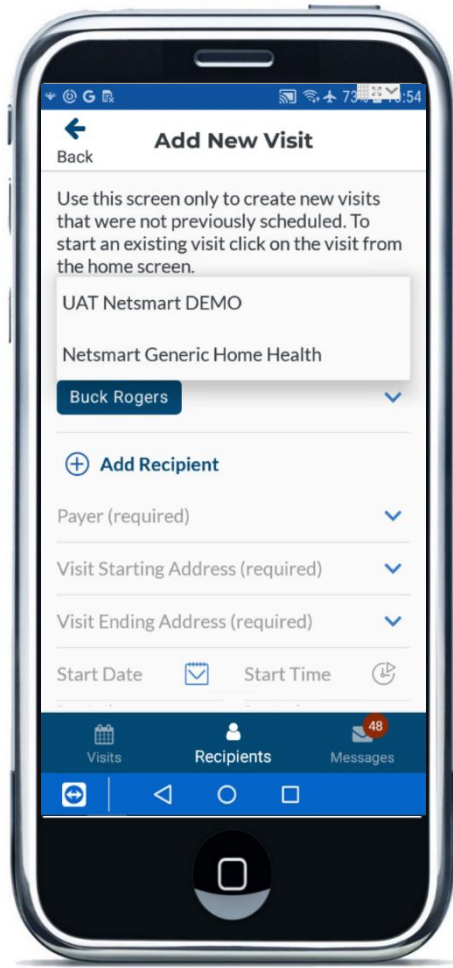
Caregivers can schedule visits from Mobile Caregiver+. Caregivers must receive approval to schedule visits from Mobile Caregiver+; please check with your Provider Admin.





To schedule a visit:

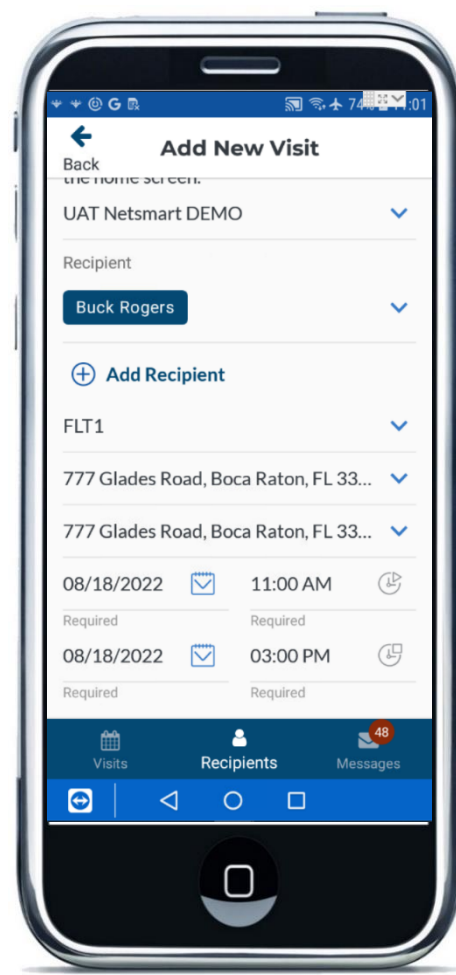
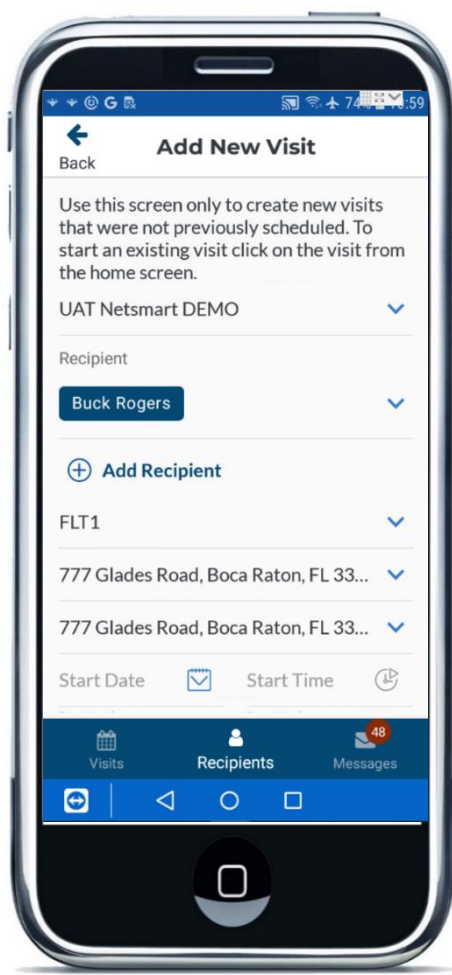
1. Tap the **Recipients** icon, located at the bottom of the screen.
2. Tap on the record for Recipient you want to schedule the visit for.
3. Tap the **Add Visit**, , command to open the New Visit screen. The Agency and Recipient name are auto populated.




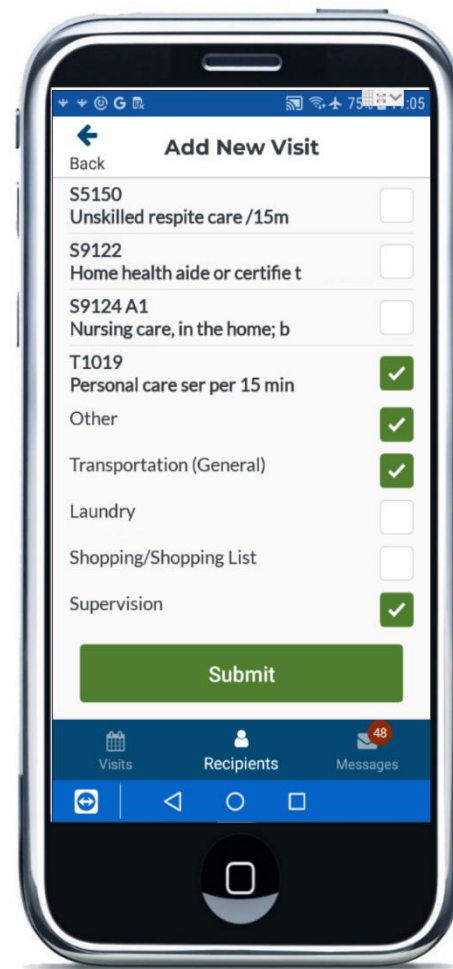
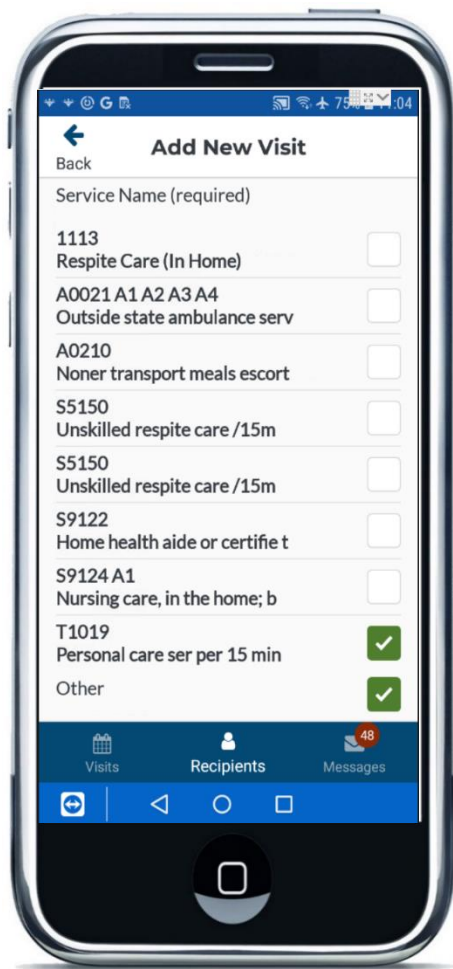
4. Tap Payer, to auto populate the **Payer** field.
5. If the visit is being scheduled for multiple Recipients, Tap **Add Recipient** to add additional Recipients.
6. Tap in the **Payer** field to select a payer and any associated subscription program/plan for the Recipient.



7. Tap in the **Visit Starting Address** field and select the address where the service will start.
8. Tap in the **Visit Ending Address** field and select the address where the service will end.
9. Touch the calendar icon, , located in the **Start Date** field to select the date the visit will occur.
10. Tap the clock icon, , located in the **Start Time** field to select the time the visit will start.
11. Tap the calendar icon, , located in the **End Date** field to select the date the visit will end.
12. Tap the clock icon, , located in the **End Time** field to select the time the visit will end.



13. Checkmark each service that will be performed.
14. Uncheck any Tasks that are not being assigned.
15. Scroll to the bottom of the form and tap the **Submit** command, , to add the visit to your schedule.
16. The system will display a confirmation dialog box, indicating that the visit was successfully created.



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](#)

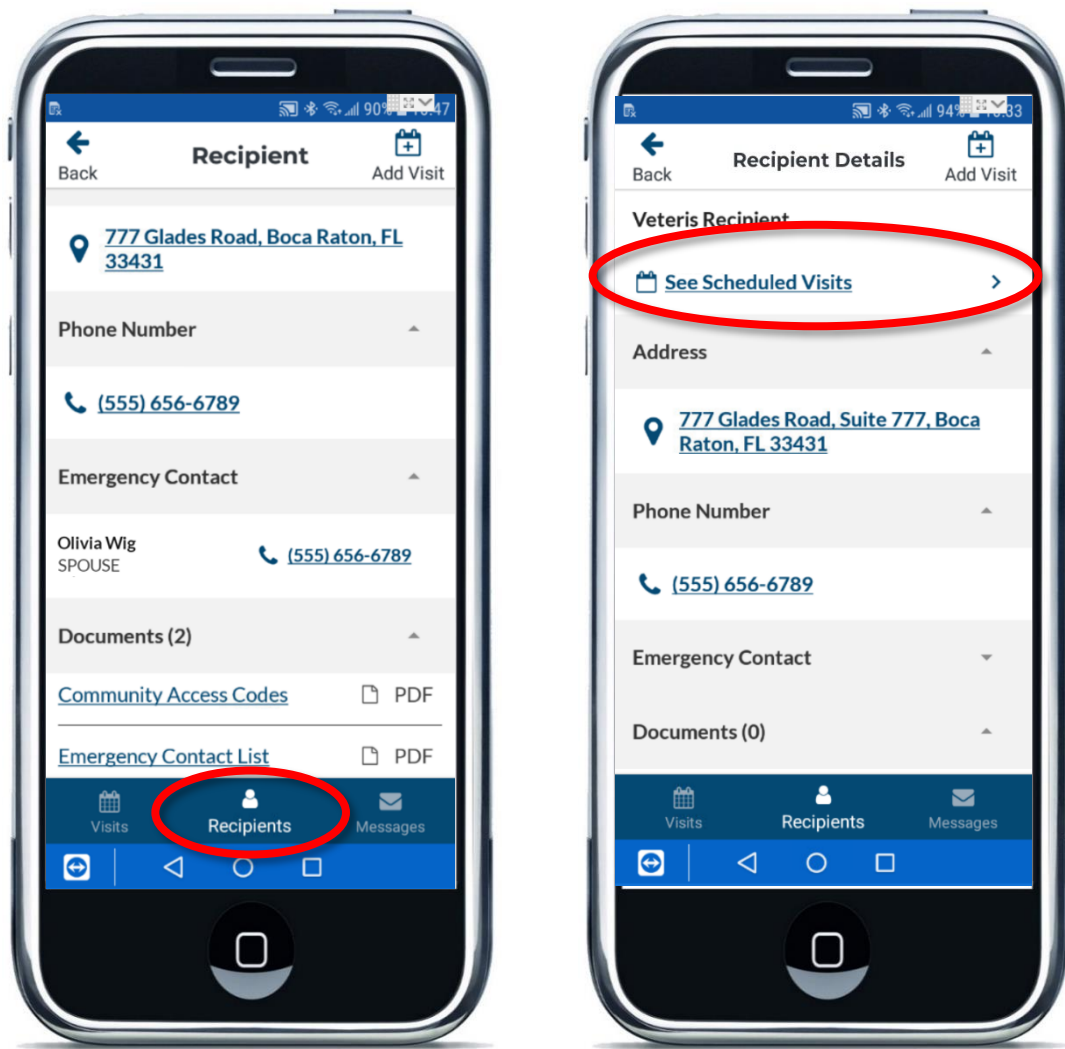
Viewing a Recipient's Scheduled Visits


You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > [Viewing Recipient's Scheduled Visits](#)

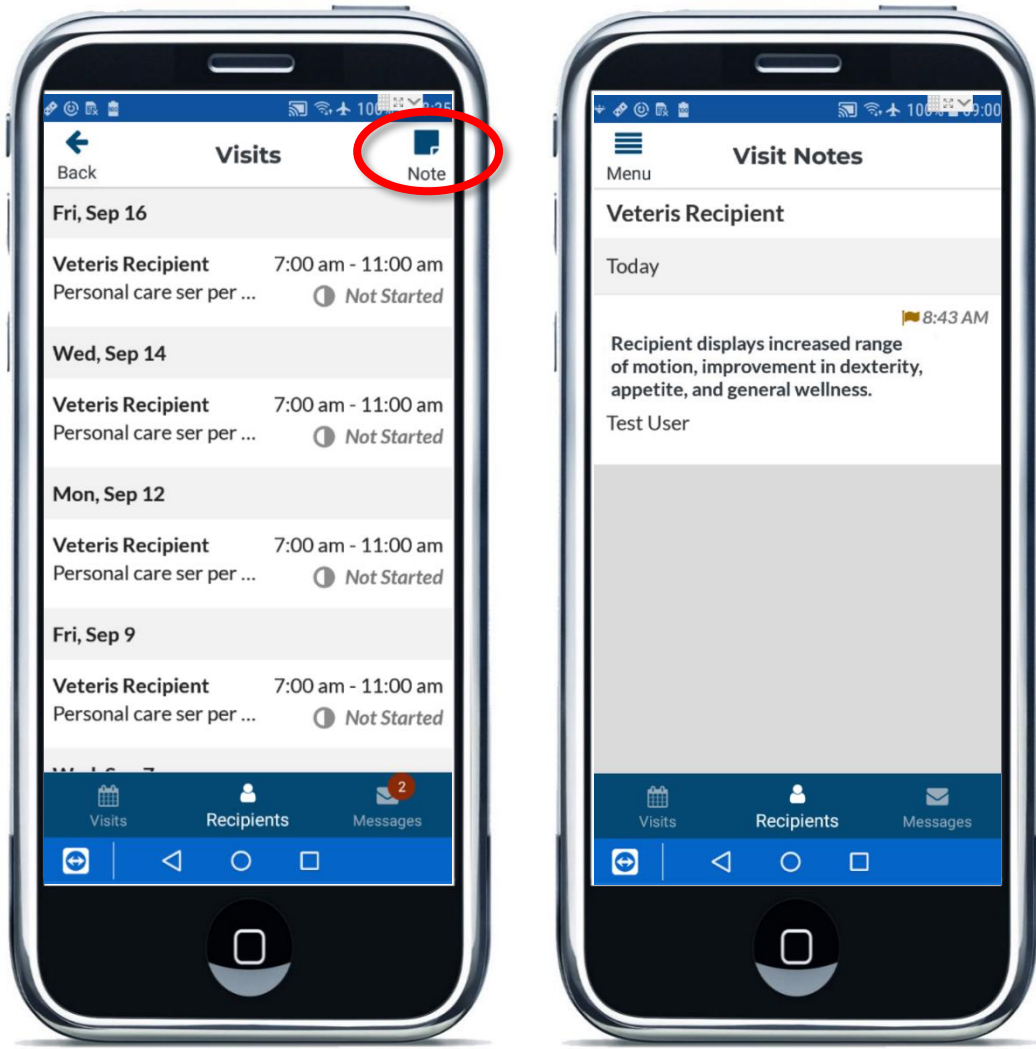
Caregivers can review a Recipient's scheduled visit from his/her Mobile Caregiver+ profile.

To view a Recipient's scheduled visits:

1. Tap the **Recipients** icon, located at the bottom of the screen.
2. Tap on the record for Recipient whose scheduled visits you want to review.
3. 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.

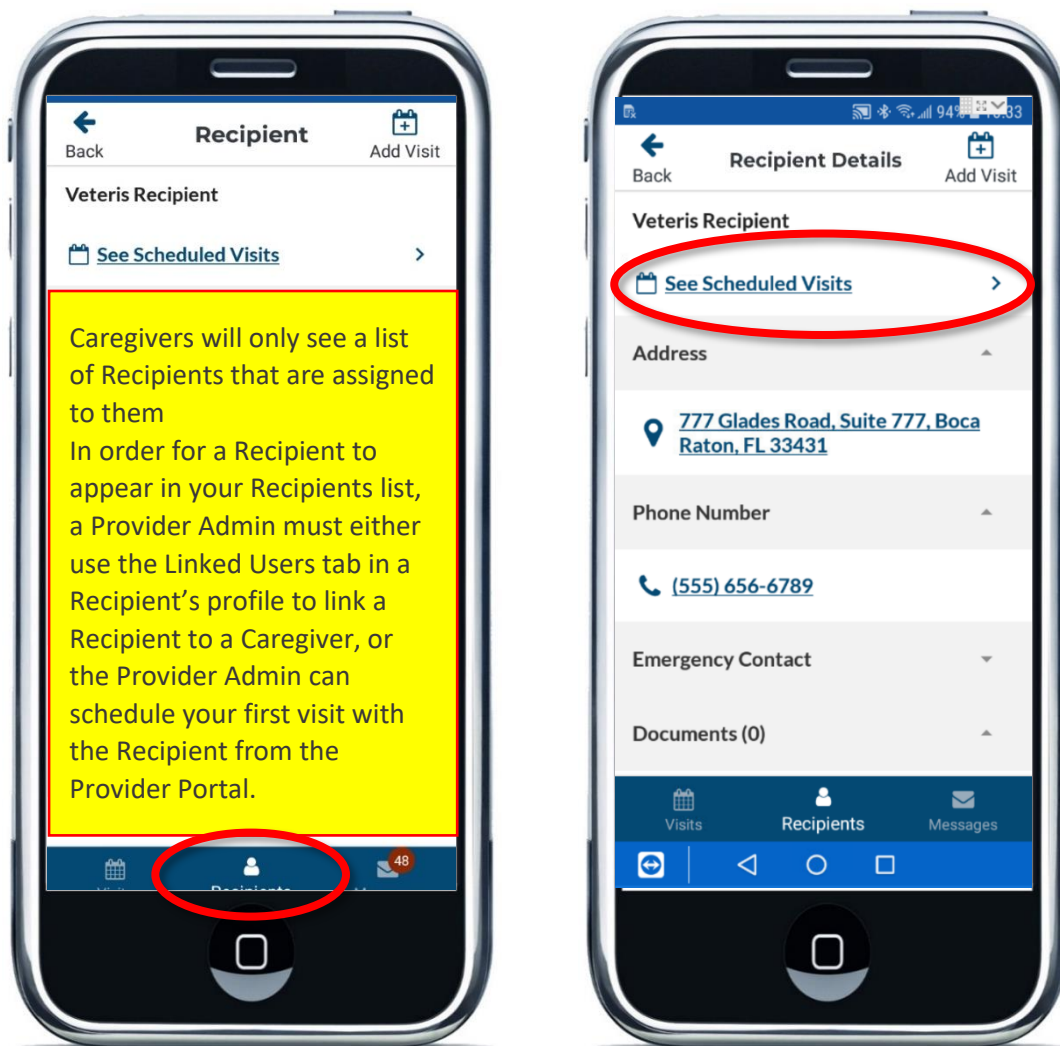



Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile

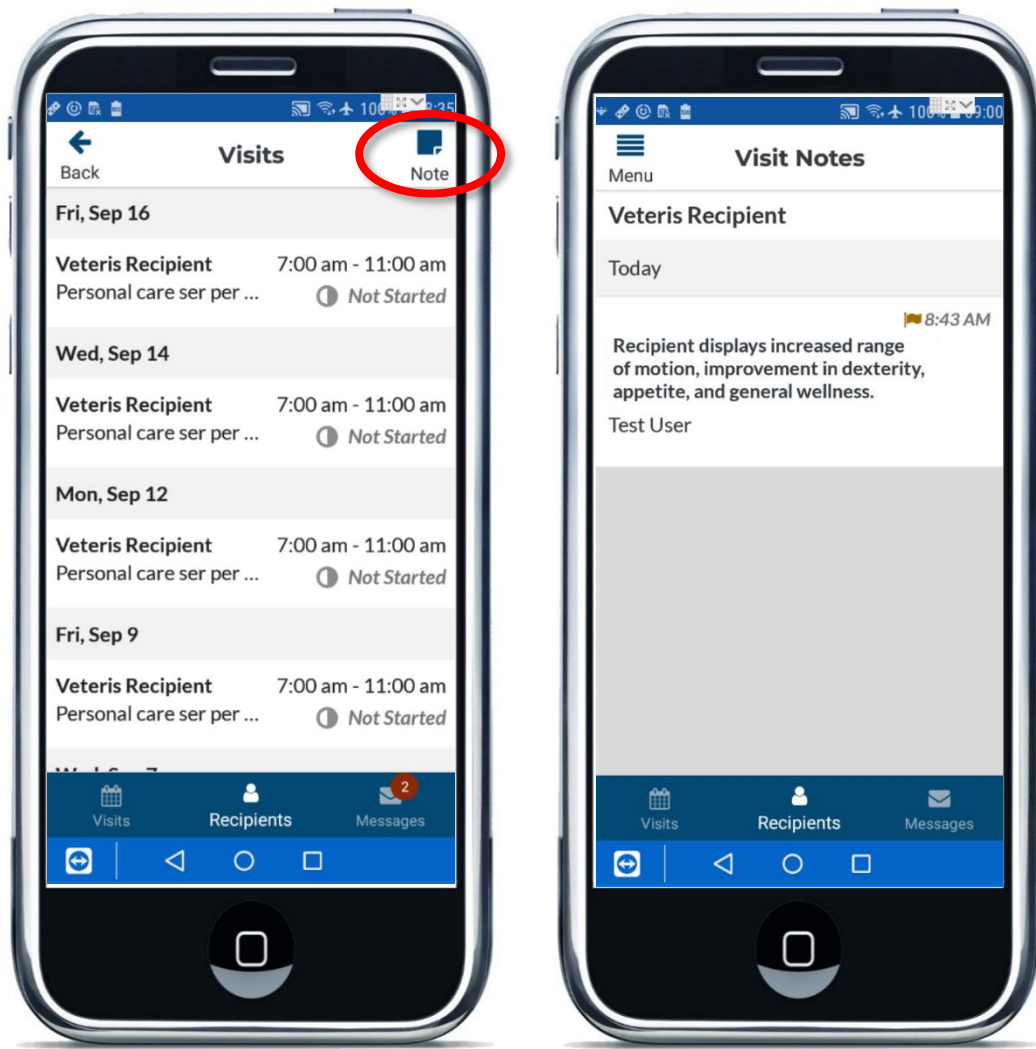
You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile

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

1. Tap the **Recipients** icon, located at the bottom of the screen.
2. Tap on the record for Recipient historical notes you want to view.
3. 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.



- Tap on the **Note** icon, , to view historical notes that have been added to the Recipient's Mobile Caregiver+ EVV record.



Related Topics

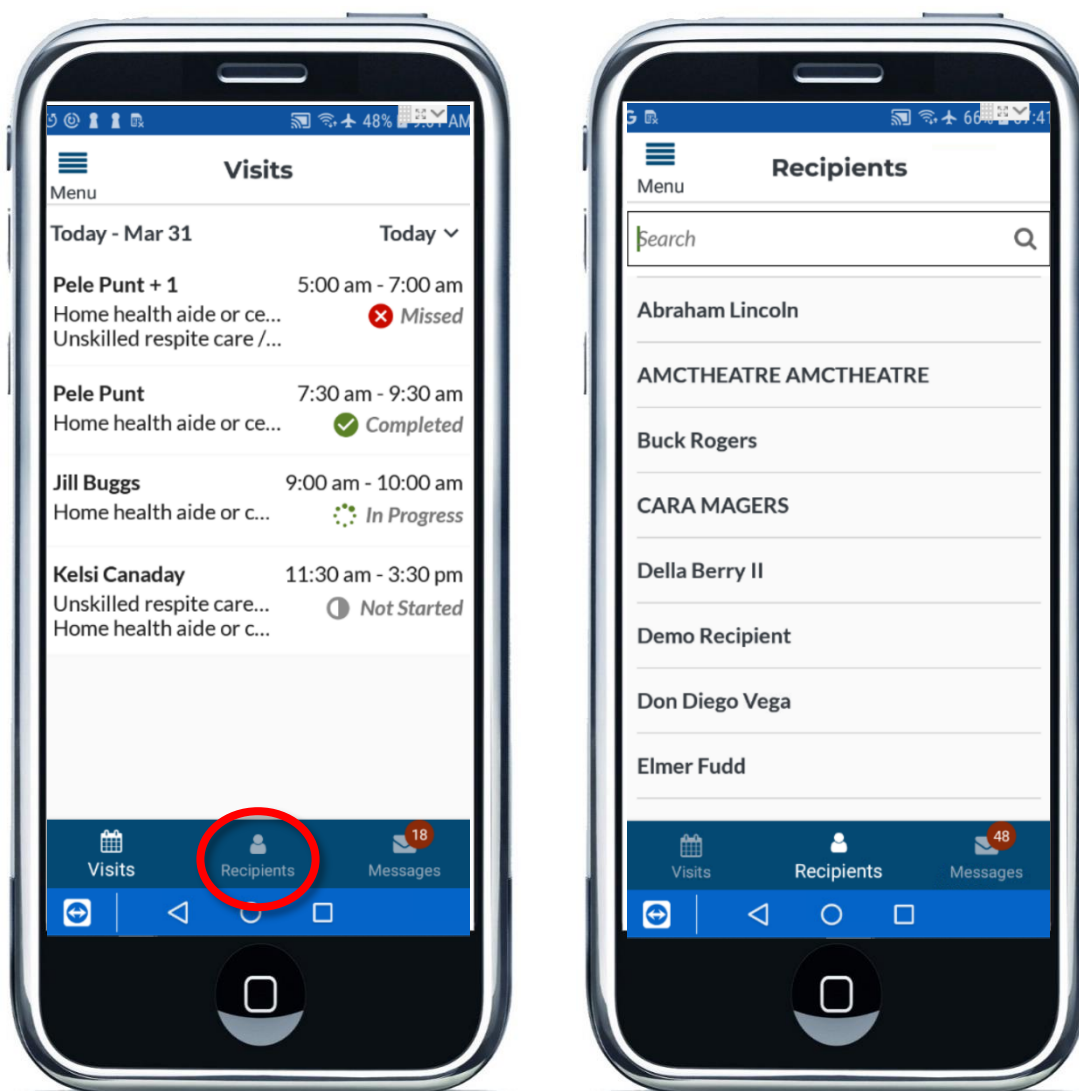
- [Adding an Unscheduled or New Visit](#)
- [Getting Directions to a Recipient's Address](#)
- [Viewing Historical Notes in a Recipient's Mobile Caregiver+ Profile](#)
- [Calling a Recipient or Emergency Contact](#)
- [Viewing a Recipient's Documents](#)
- [Viewing a Recipient's Notes](#)

Getting Directions to a Recipient's Address

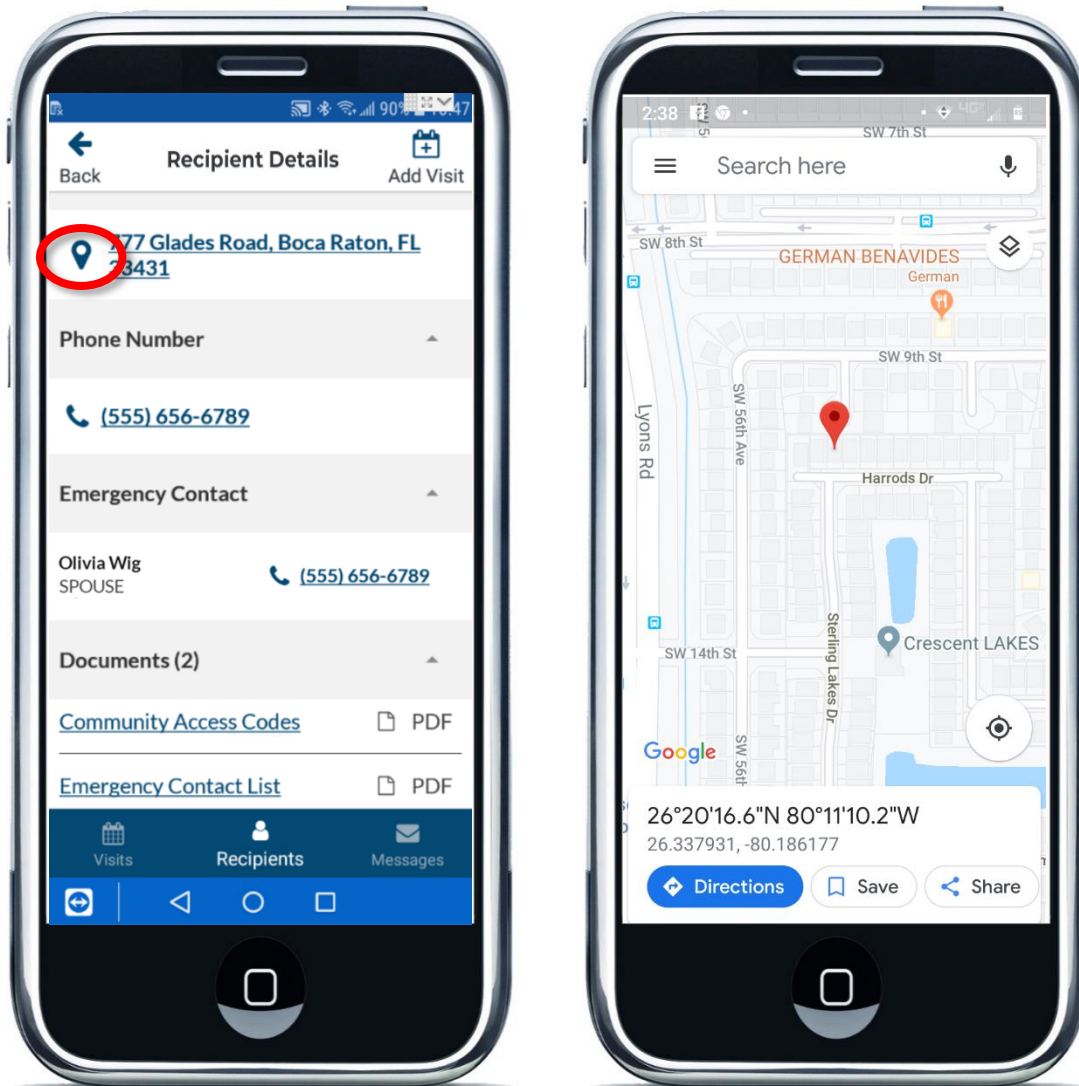
You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > [Getting Directions to a Recipient's Address](#)

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

1. Select a visit or tap the **Recipients** icon at the bottom of any screen.
2. Tap on the record for the Recipient you want to select.



3. Tap on the map pin for the address to open Google Maps to get directions.



Related Topics

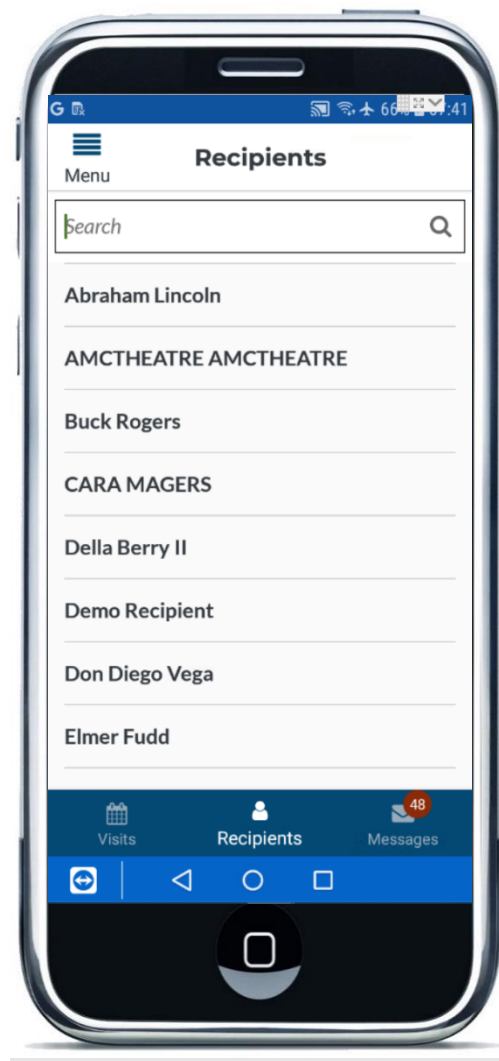
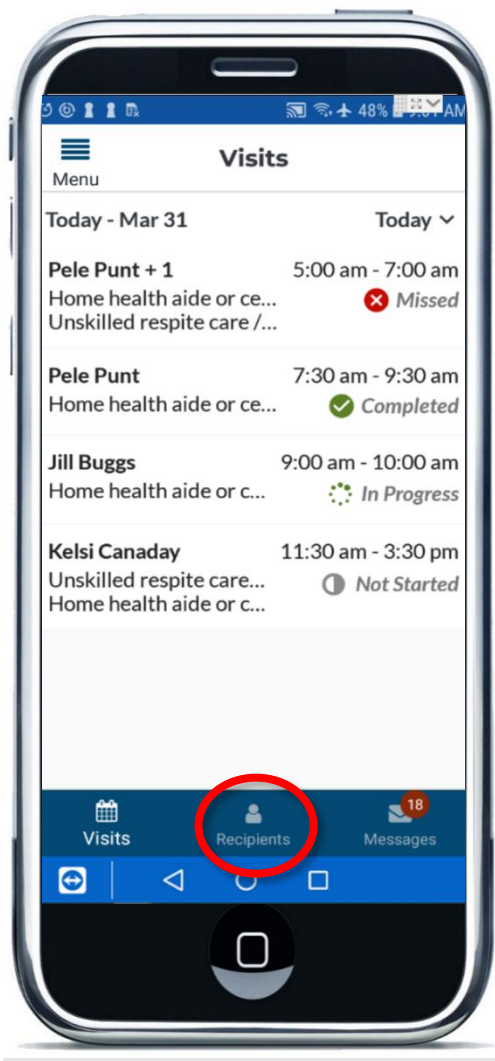
- [Viewing Recipients](#)
- [Adding an Unscheduled or New Visit](#)
- [Calling a Recipient or Emergency Contact](#)
- [Viewing a Recipient's Documents](#)
- [Viewing a Recipient's Notes](#)

Calling a Recipient or Emergency Contact

You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > [Calling a Recipient or Emergency Contact](#)

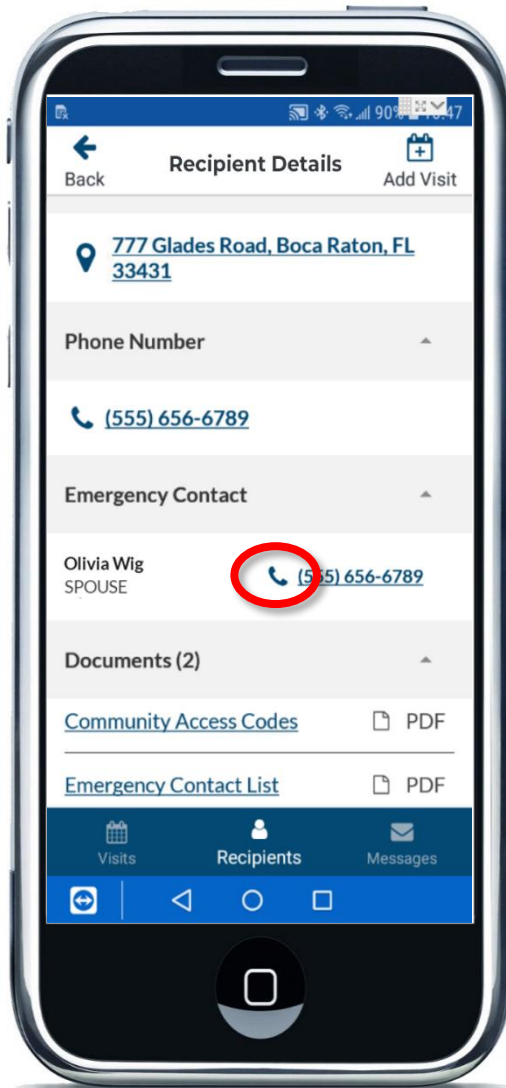
To call a Recipient or Emergency Contact:

1. Tap on the **Recipients** icon at the bottom of any screen.
2. Tap on the record for the Recipient you want to call.



3. Tap the phone icon next to the Recipient or Emergency Contact to open the calling feature on your device.

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](#)

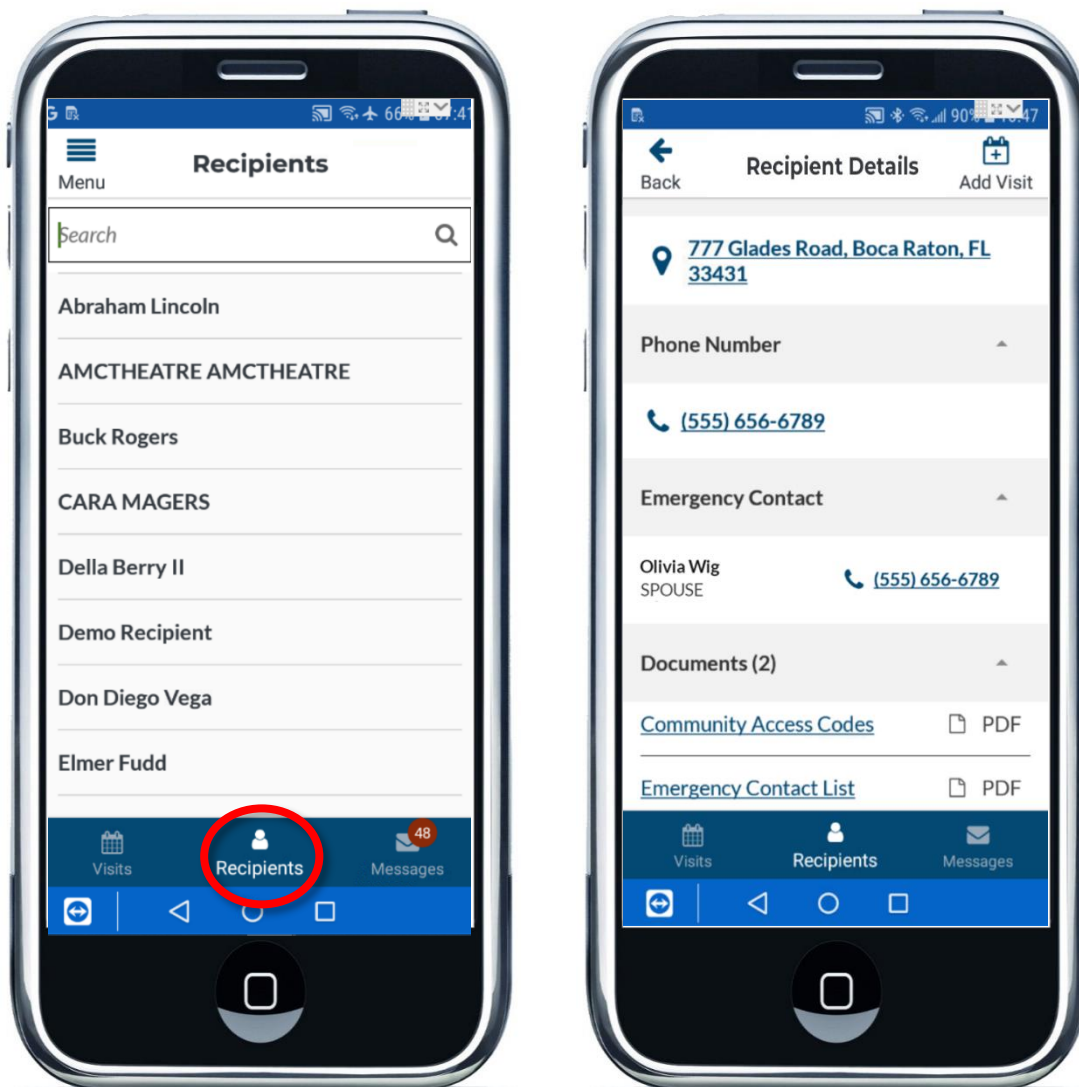
Viewing a Recipient's Documents

You are here: [Mobile Caregiver+](#) > [Preparing for a Visit](#) > [Viewing a Recipient's Documents](#)

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:

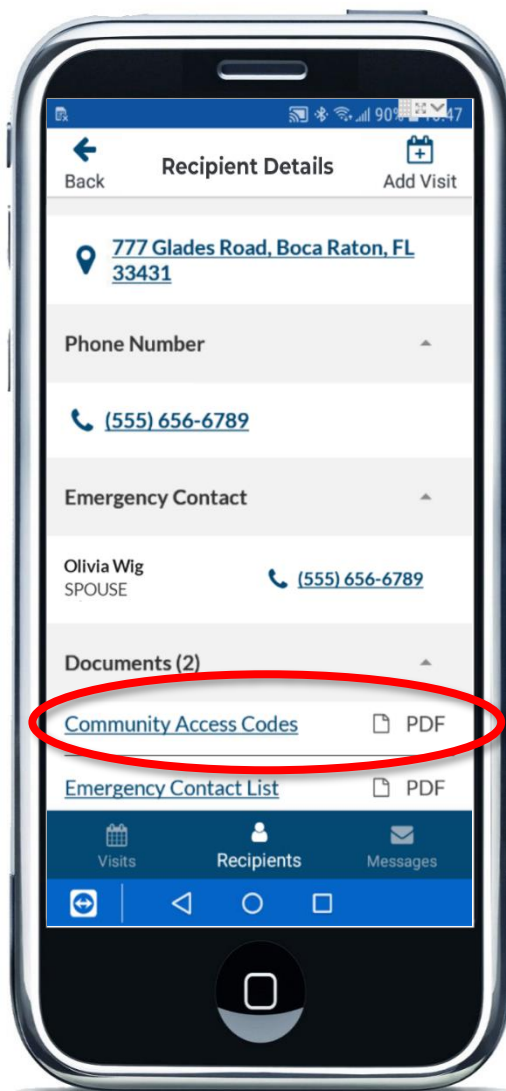
1. Tap on the **Recipients** icon at the bottom of any screen.
2. Tap on the record for the Recipient you want to select.



3. Scroll to the bottom of the screen to see available documents.
4. 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](#)

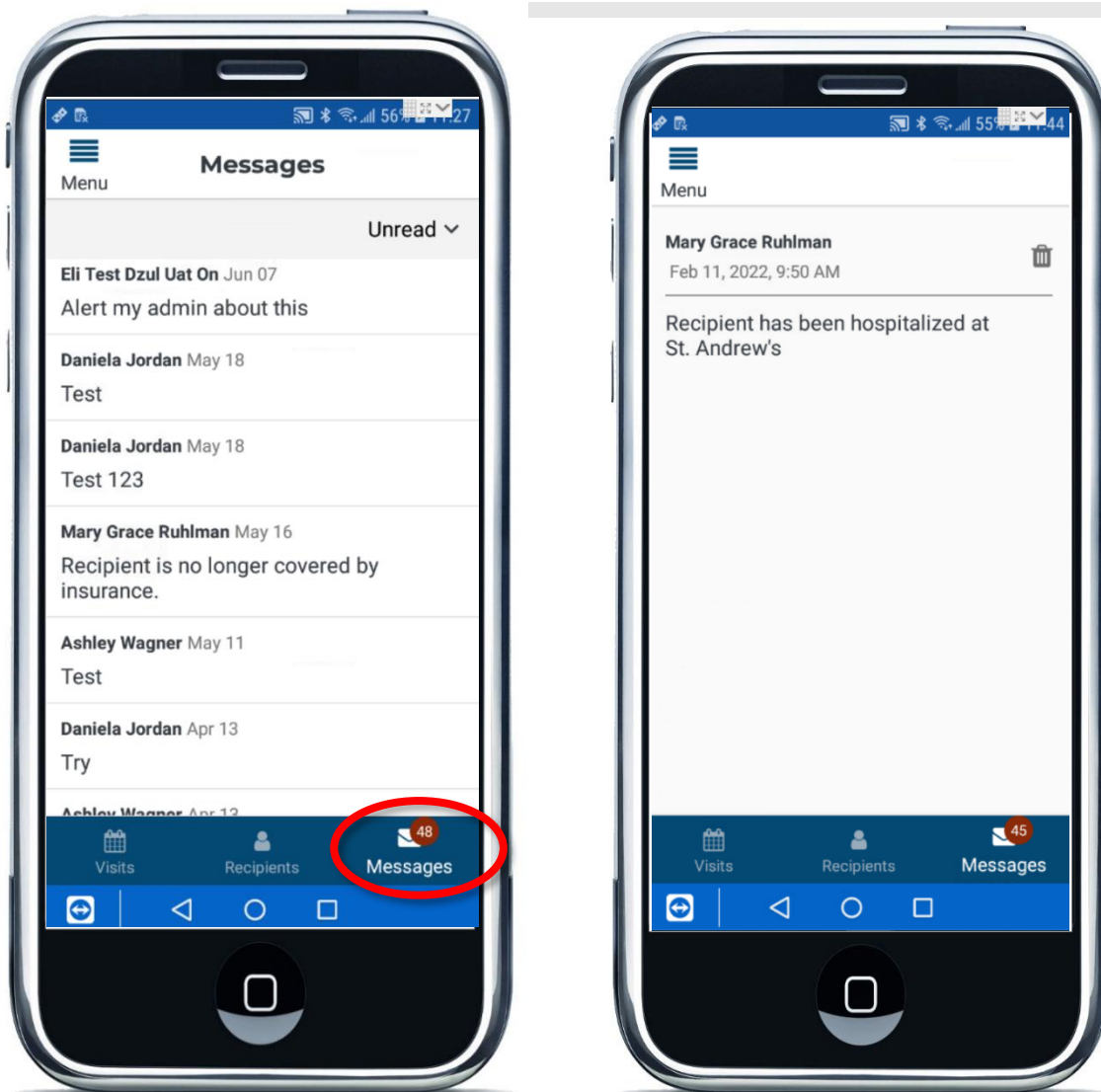
Checking Messages

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

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,  , at the bottom of the screen to display your messages.
2. Tap a message to open it.

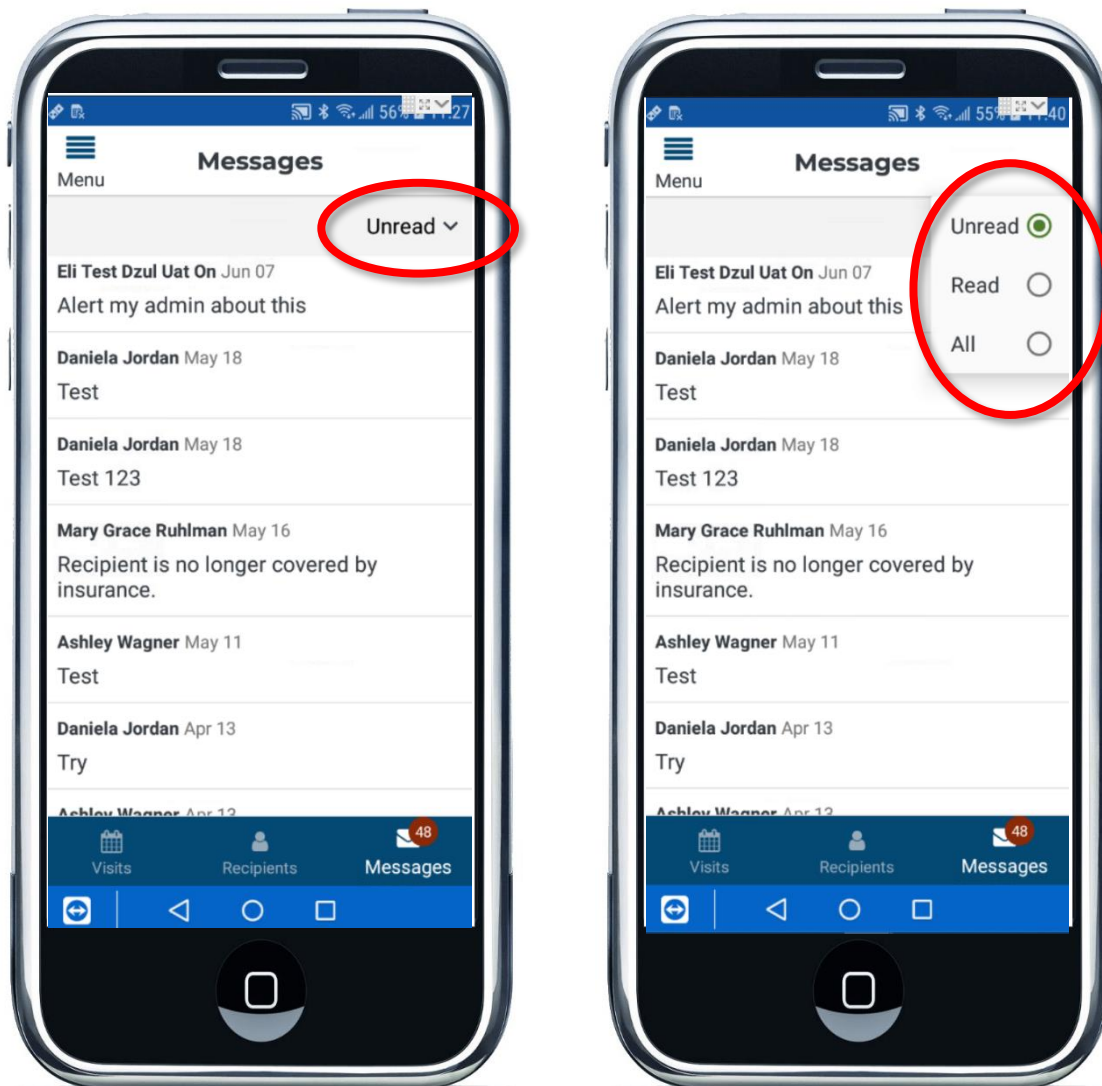


Filtering Messages

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

To filter messages in the Inbox:


1. Tap the **Messages** icon, , at the bottom of the screen to display your messages.
2. 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.

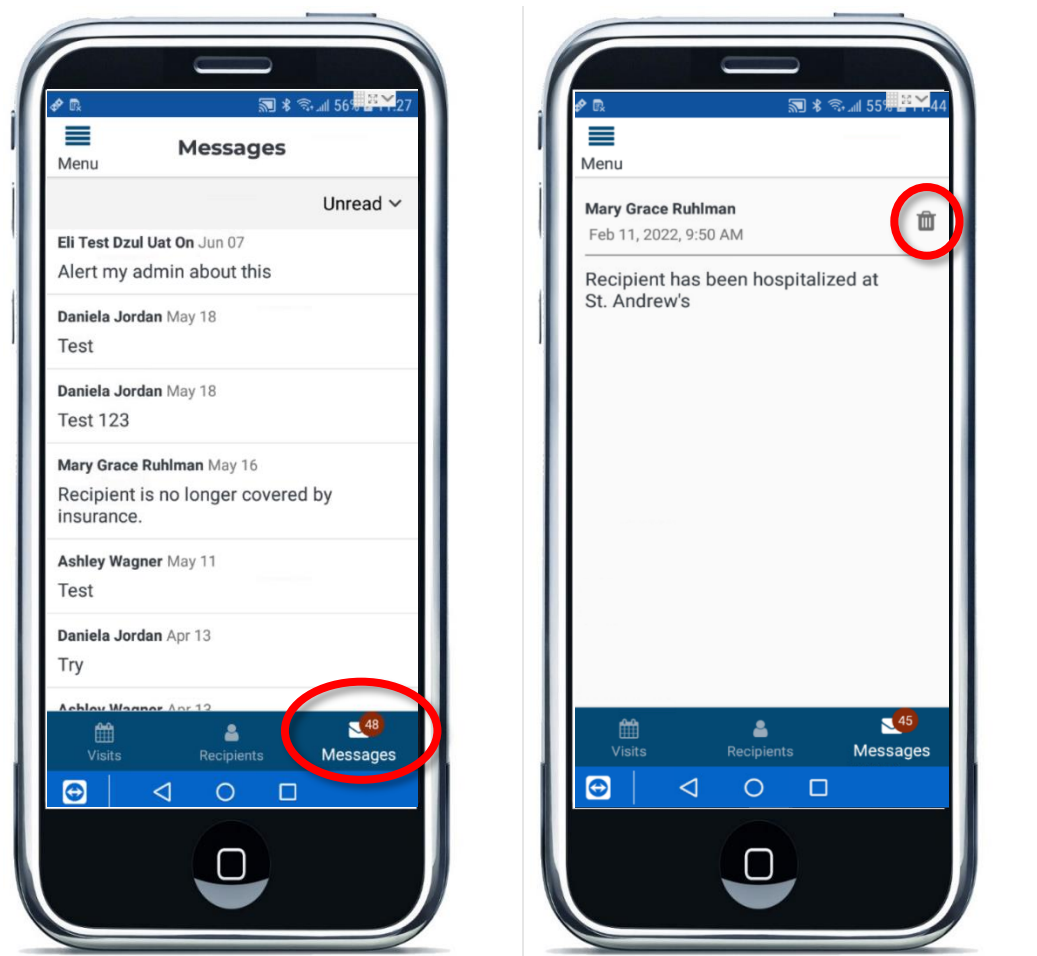


Deleting a Message

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 the trash can icon, , in the upper right corner to delete the message.



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](#)

Managing Visits

Click on a topic below:

[Starting and Ending a Visit](#)

[Completing a Visit When you are Offline](#)

[Adding Notes and Sending Alerts](#)

Starting and Ending a Visit

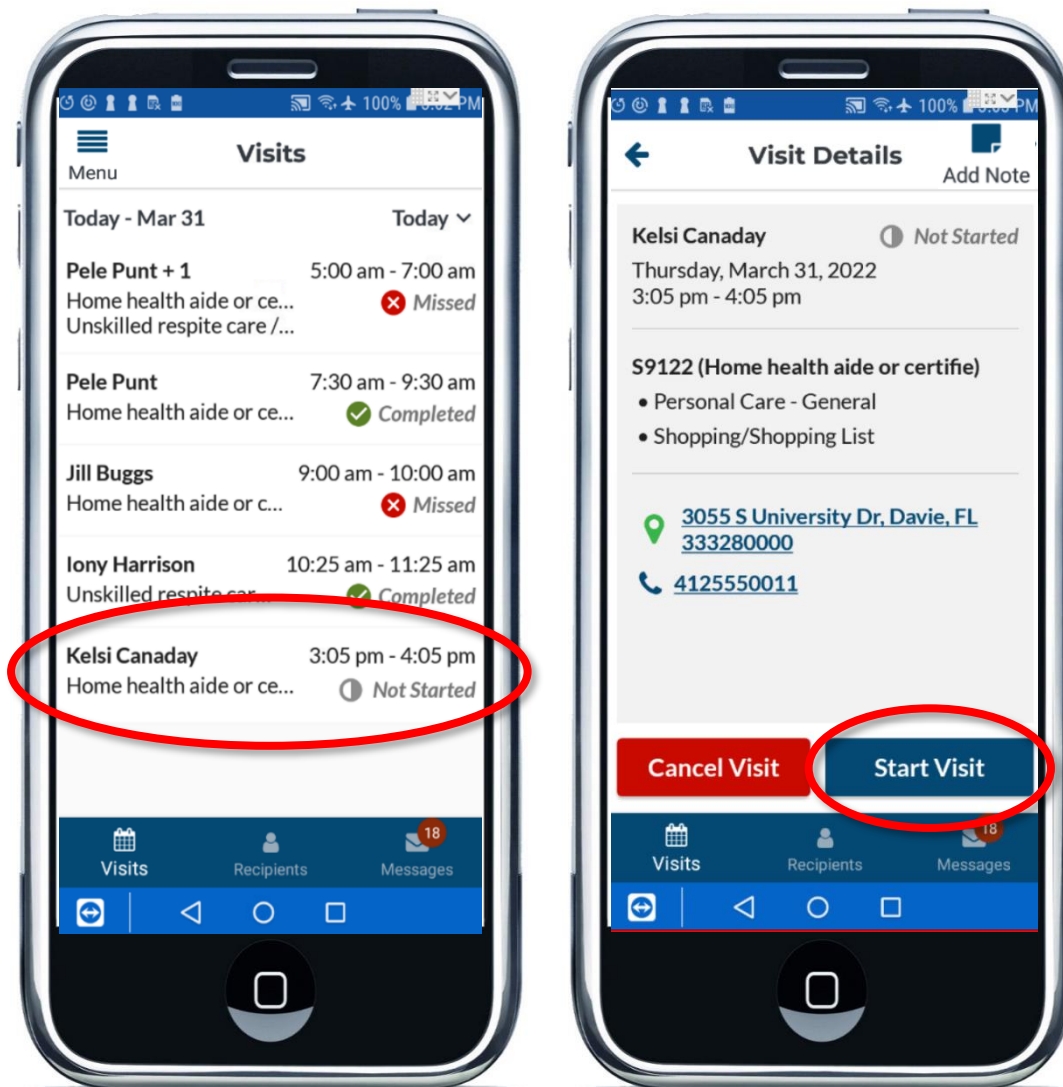
You are here: [Mobile Caregiver+ > Managing Visits](#) > Starting and Ending a Visit

To start a visit:

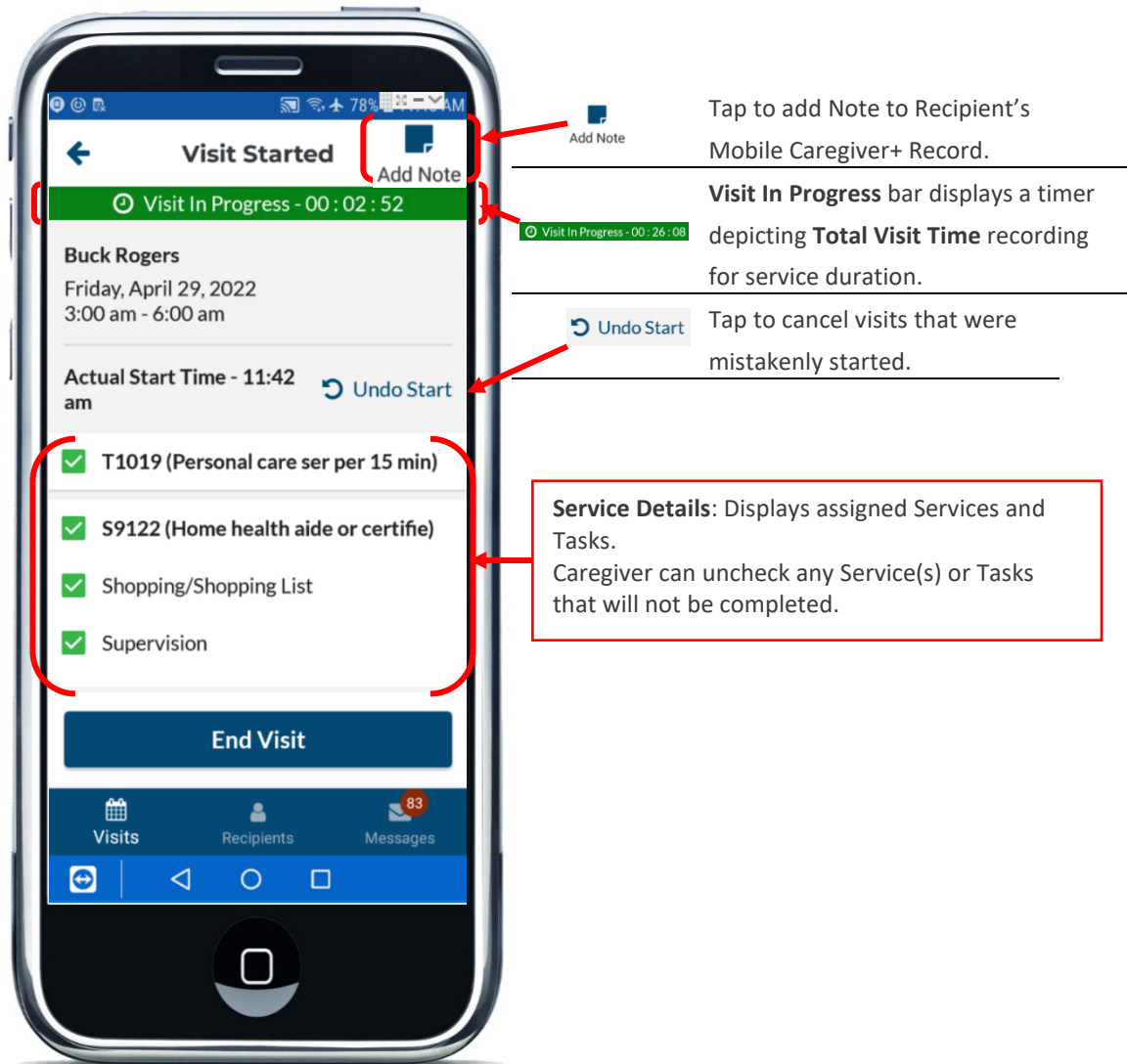
1. From the Visits List, tap on the scheduled visit for which you want to start services.


*The system displays the **Visit Details** screen.*

2. Tap **Start Visit** to start the service – the current time will be recorded as the **Actual Start Time** of the service.



3. The green **Visit In Progress** bar at the top of the Visit Started screen displays a timer which records the **Total Visit Time**. Scroll down to see the assigned service(s) and any assigned task(s) to be completed.
4. Caregivers can uncheck any Task(s) or Services that will not be completed.
5. After completing all assigned services, tap **End Visit** to stop the timer and display the **Visit Summary** screen.



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

By default, the system will checkmark all assigned services and tasks as being completed; uncheck any service(s) or tasks that were not completed.

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.*

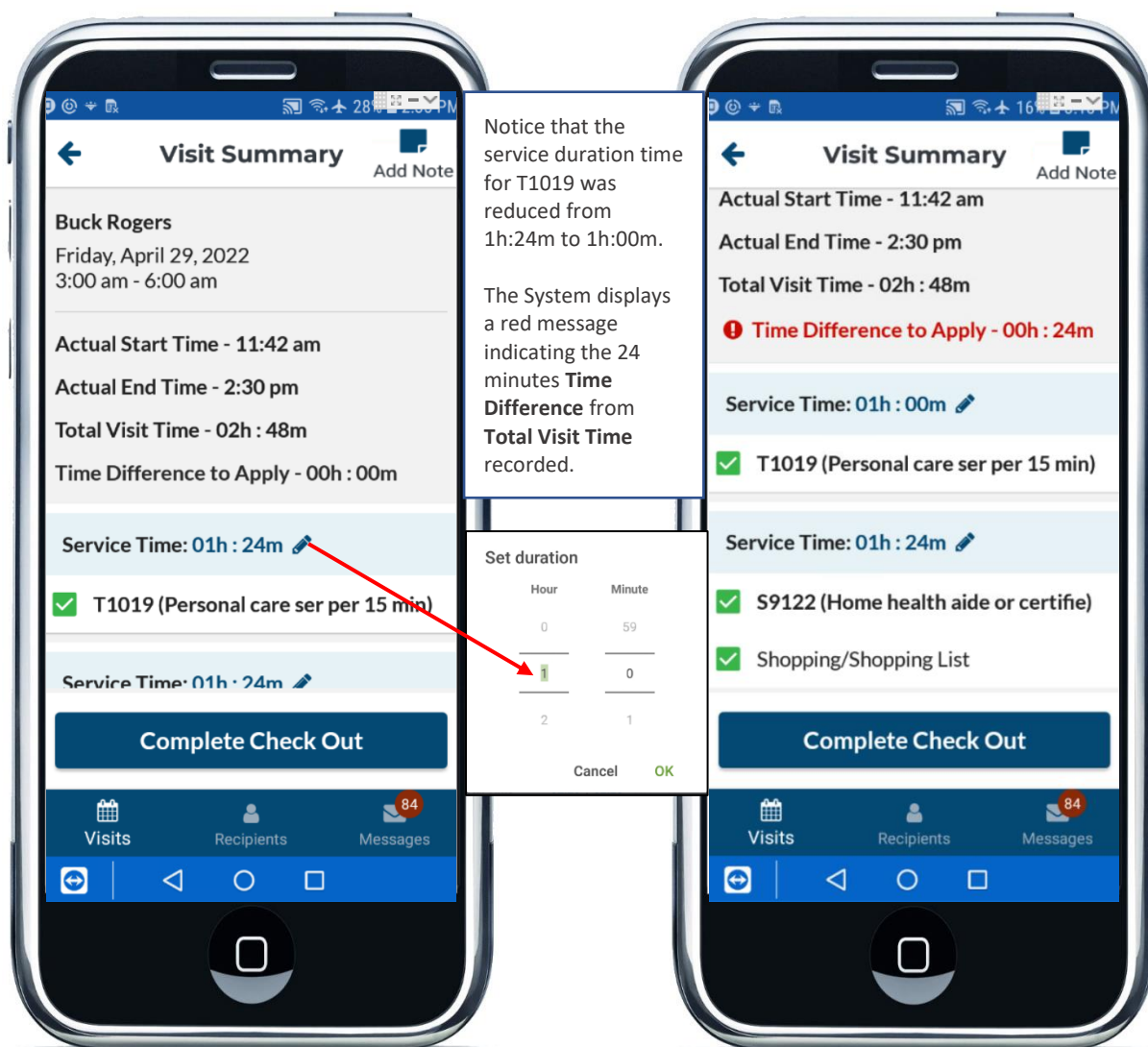
*For visits where a Caregiver has been assigned multiple services in the same visit, the system will split (divide) the **Total Visit Time** recorded time evenly between the assigned services.*

*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.*

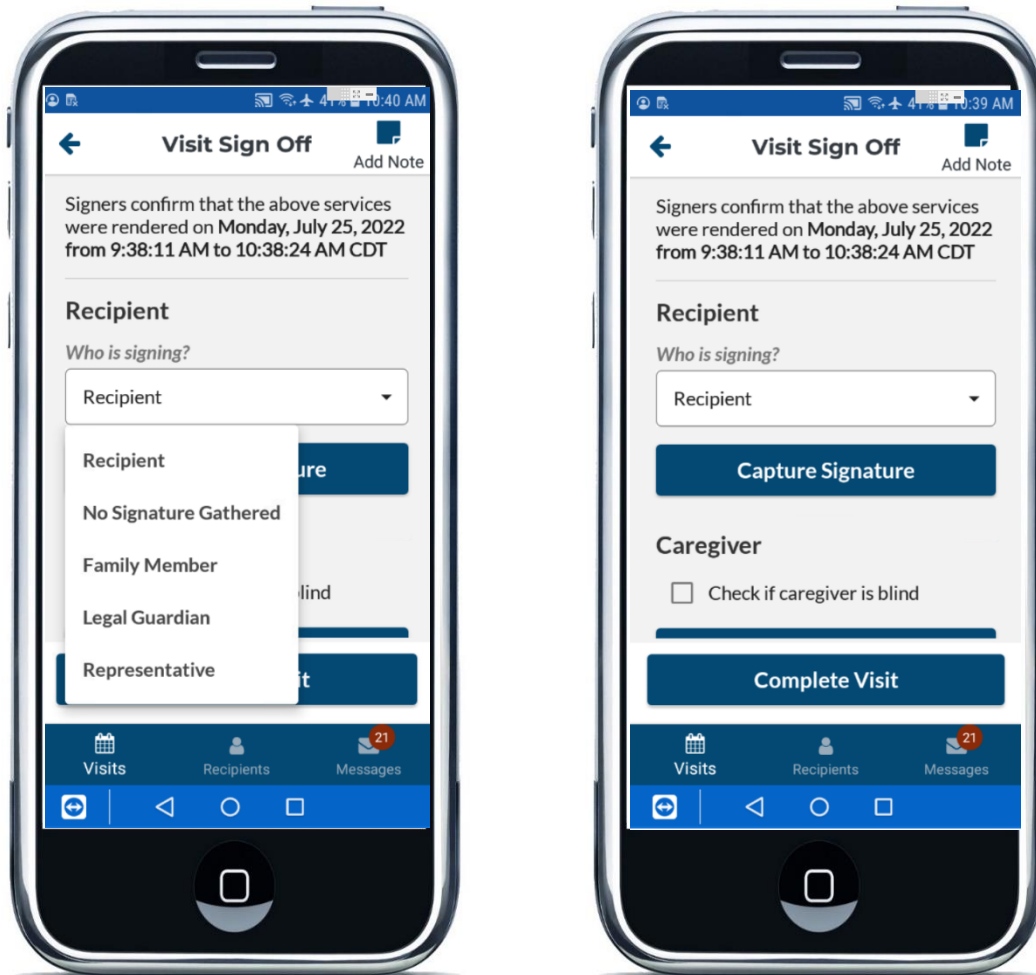
WARNING: *Unchecking an assigned service will set the billable time to 0, zero; you must re-enter, configure, the billable time for any completed service that was unchecked.*

6. If necessary, Caregivers can manually adjust the amount of billable **Service Time(s)**.
7. Tap on the icon, ✎, next to a service and manually configure the **Service Time**.
8. Tap **OK** to save the manually adjusted **Service Time**.
9. 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.



Recipient Signature

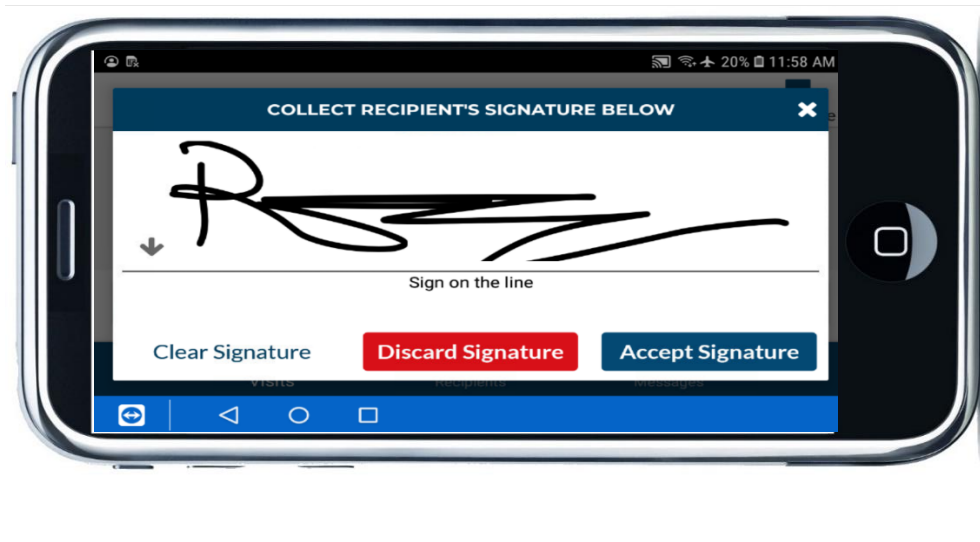
10. Below the word **Recipient**, click on the “**Who is signing?**” drop-down list.
11. From the list, select **Recipient**.
12. Click the Capture Signature command, .



6. 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.

13. Hand the mobile device to the Recipient and have him/her sign.
14. Click the **Accept Signature** command to save the signature

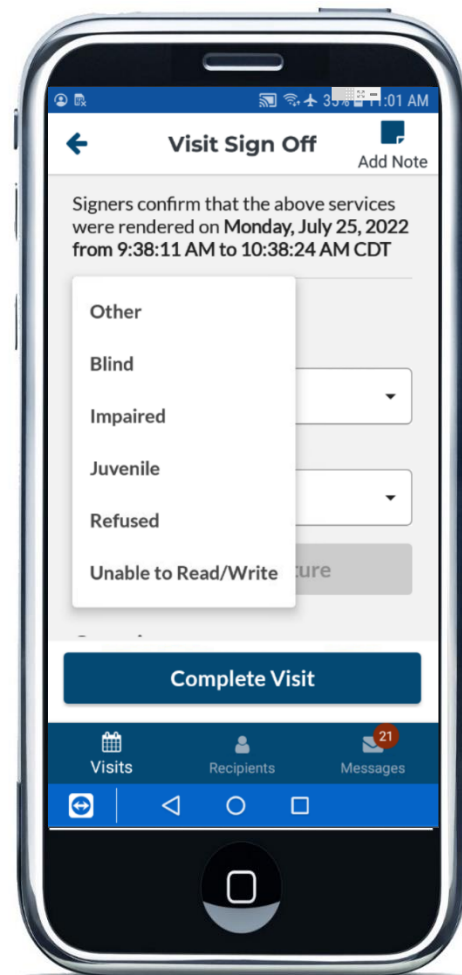
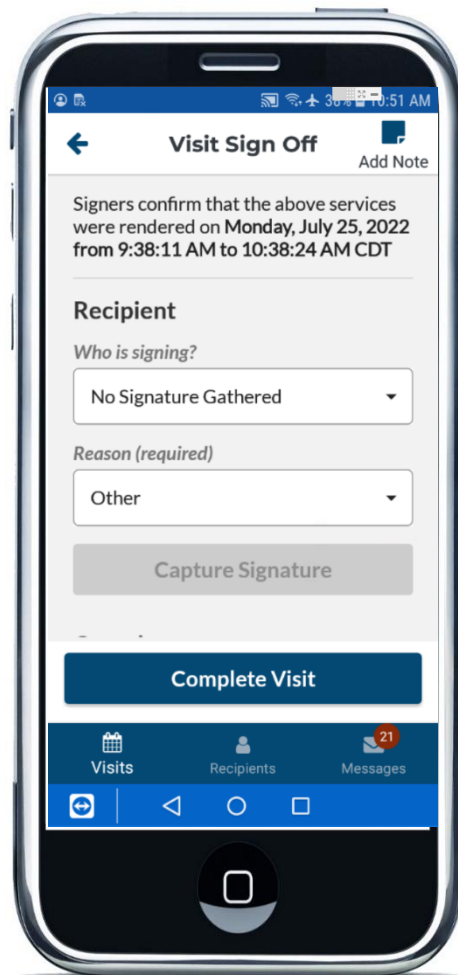
*Note: you can tap the **Clear Signature** command to clear current signature and have the Recipient sign again, or you can tap **Discard Signature** to return to the previous screen and select a different “Who is signing?” option.*



No Signature Gathered

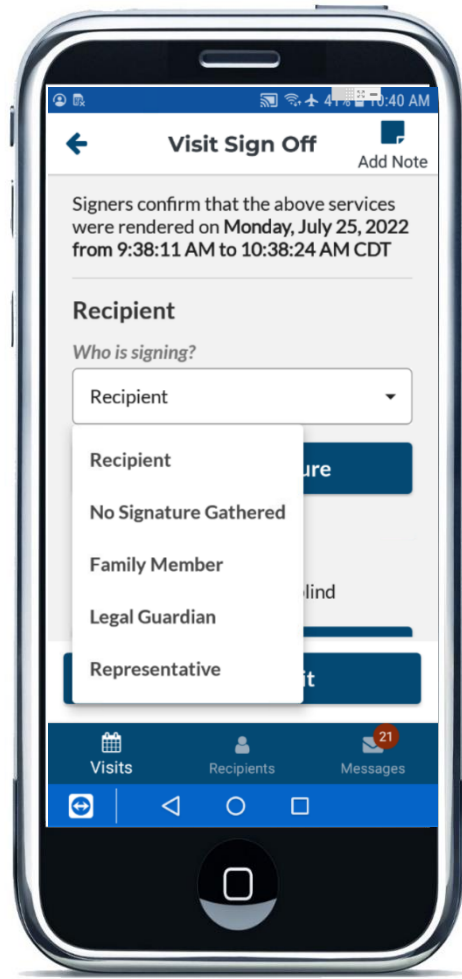
- I. From the “**Who is signing?**” drop-down list, select **No signature Gathered**.
- II. Click in the **Reason** field and select the reason no signature can be gathered.

*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.*



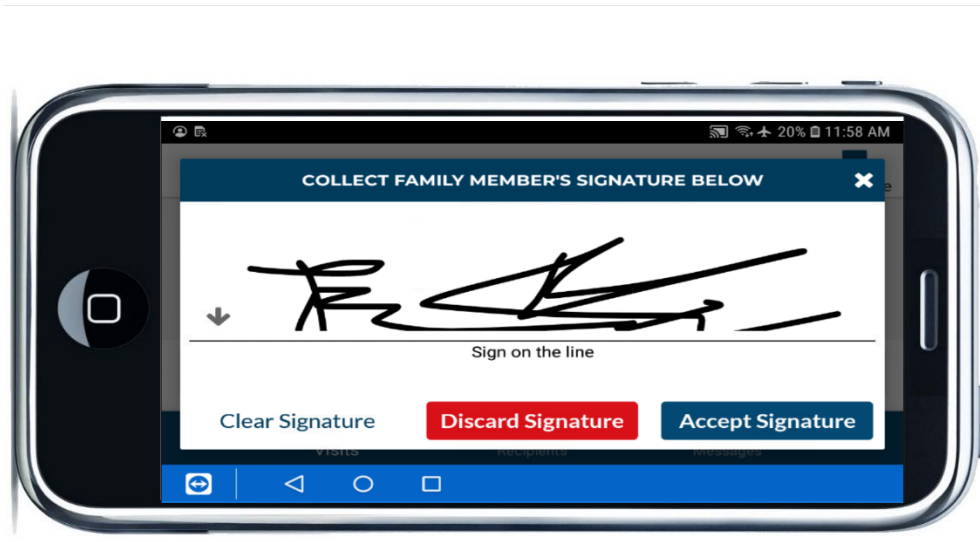
Alternative Signee

- I. From the “**Who is signing?**” drop-down list, select an alternative signee.



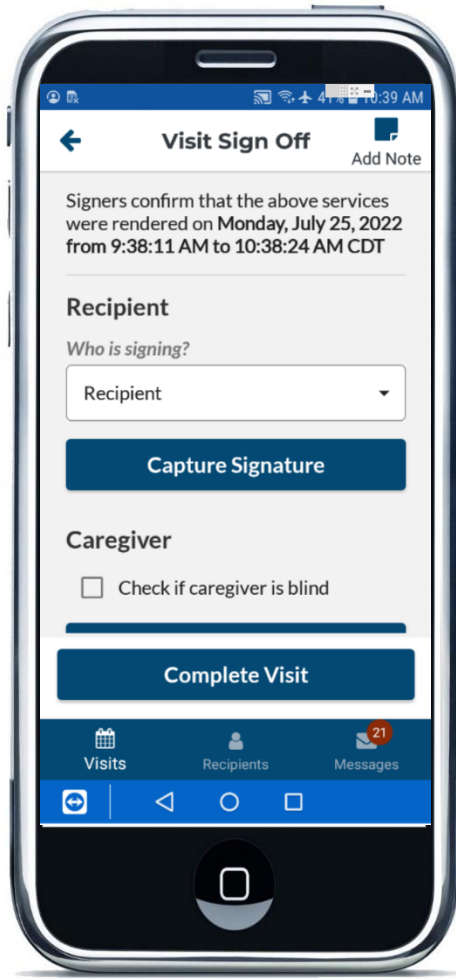
- II. Hand the mobile device to the alternative signee and have him/her sign.
- III. Click the Accept Signature Command to Save the signature

*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.*



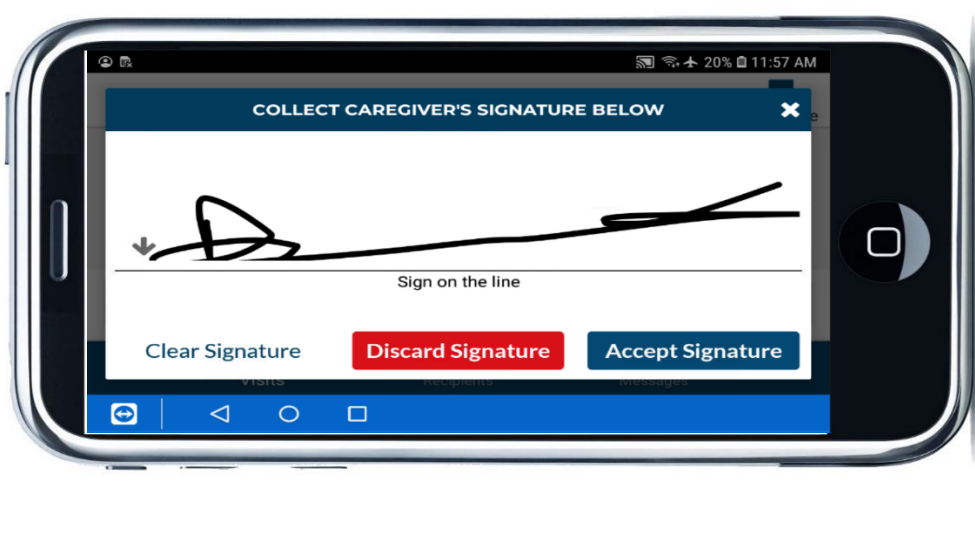
Caregiver Signature

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

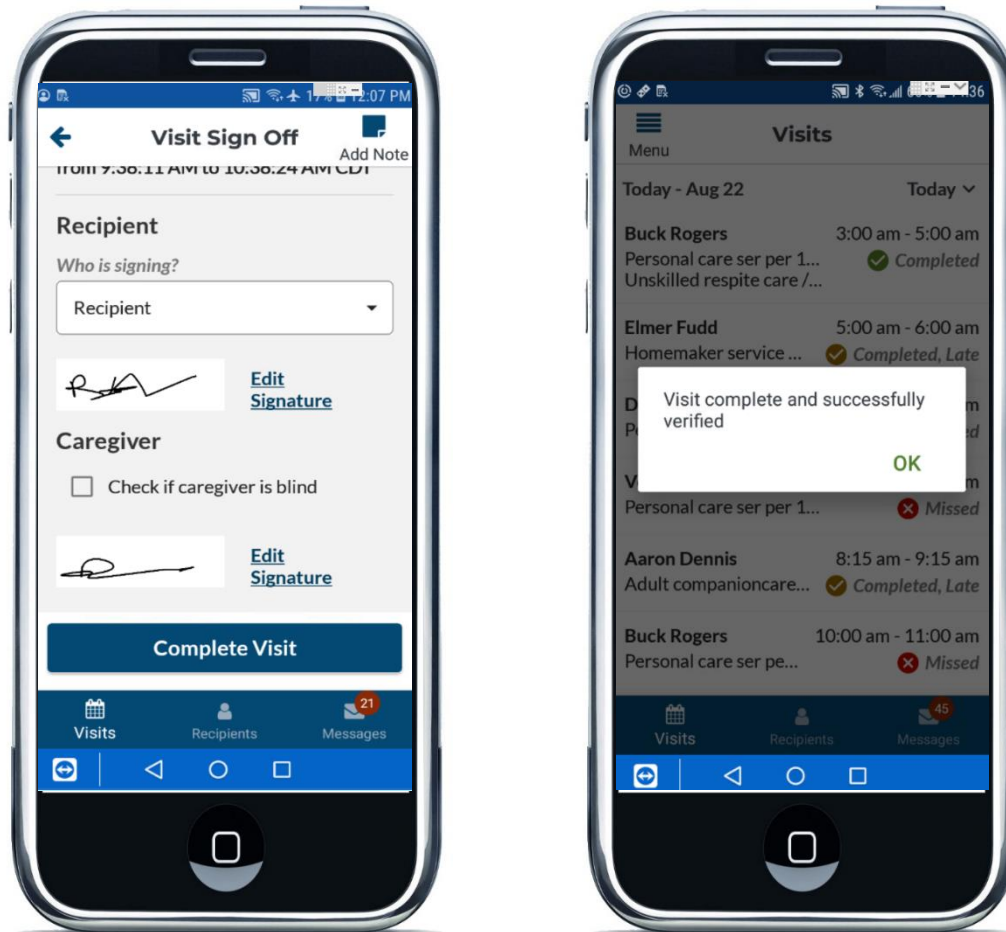


7. Go ahead and sign.
8. Click the **Accept Signature** command to save the signature

*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.*



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



17. A confirmation dialog box will appear, indicating that the visit is complete and successfully verified.

Related Topics

- [Completing a Visit when you are Offline](#)
- [Adding Notes and Sending Alerts](#)

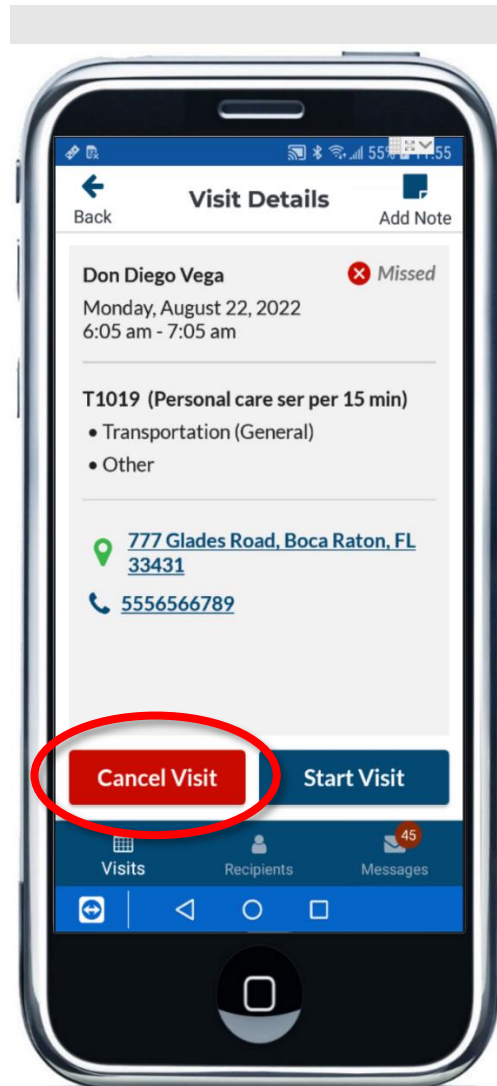
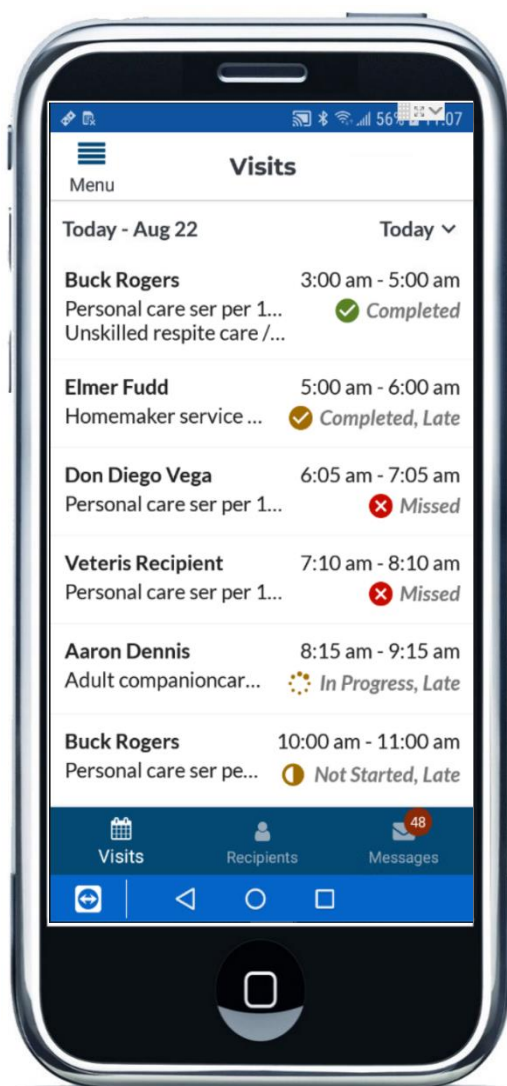
Canceling a Visit

You are here: [Mobile Caregiver+](#) > [Managing Visits](#) > [Canceling a Visit](#)

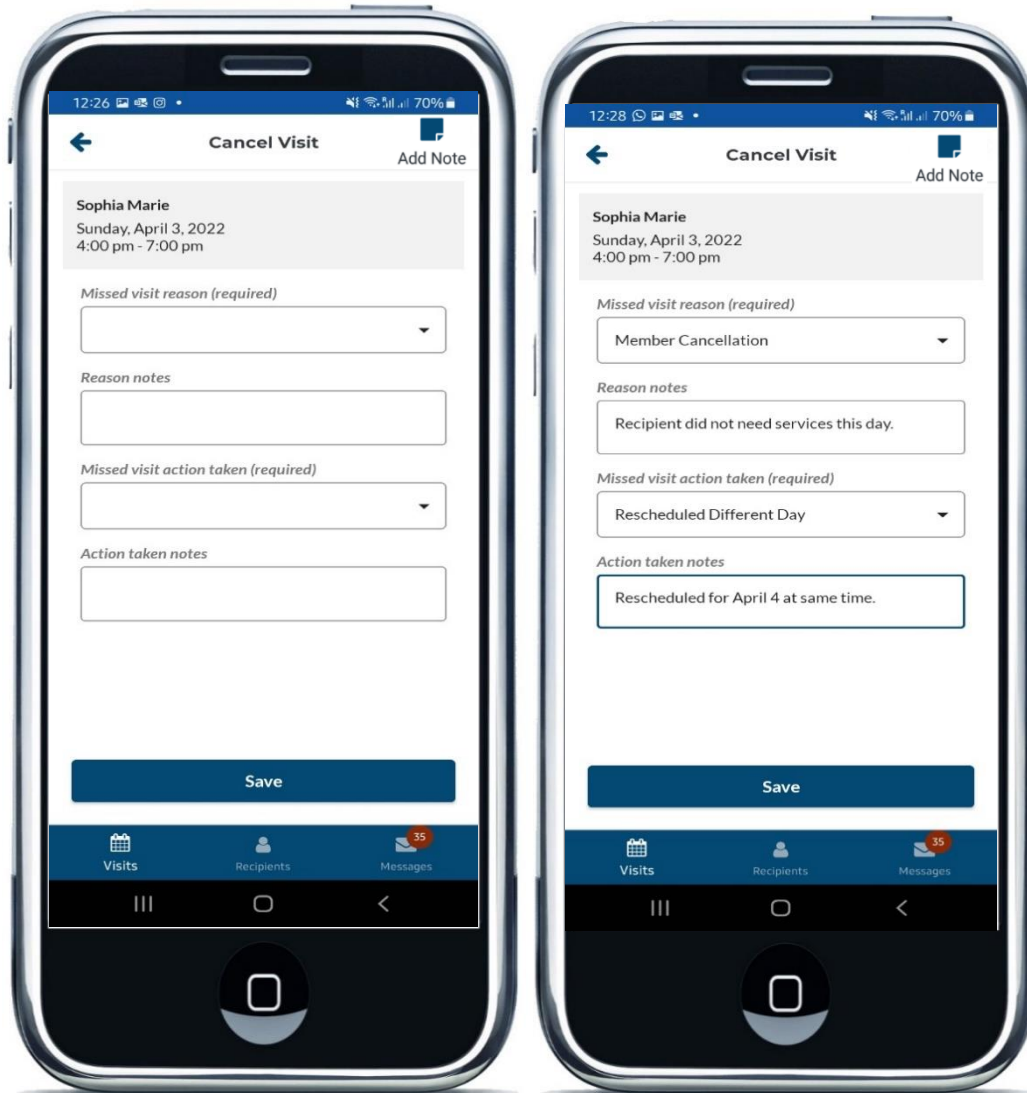
The Mobile Caregiver+ Application allows Caregivers to cancel scheduled visits. Caregivers are required to select a Reason Code for cancelling scheduled visits.

To cancel a visit:

1. From the Visits List tap on the visit want to cancel.
The **Visit Details** screen opens.
2. Tap Cancel Visit to display the Cancel Visit screen and fields.



Caregiver are required to select a Reason Code/Action Code for cancelled visits. Depending on the Reason/Action Code selected, Caregivers may be required to enter a note providing to provide additional details for cancelling the visit.



3. Use the **Missed visit reasons** field, to select the action taken, due to the Missed Visit.
4. Use the **Reason notes** field, to document any further notes needed.

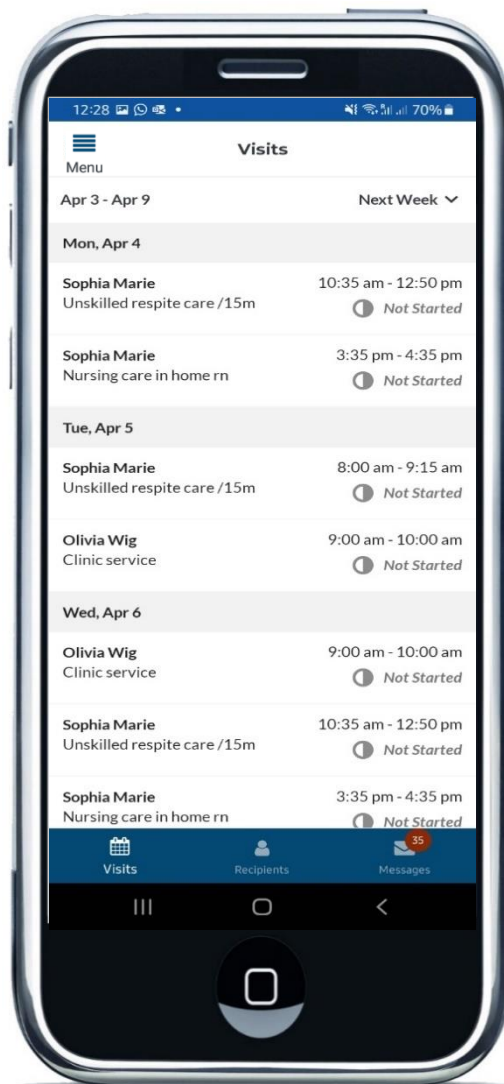
*Note: If **Member Cancellation** is selected, no note is required in the **Reason Notes** field. If **Other** is selected, the **Reason Notes** field is required.*

5. Use the **Missed visit action taken** field, to select the action taken, due to the Missed Visit.
6. Use the **Action taken notes** field, to document any further notes needed.

*Note: If **Other** is selected, the **Action taken notes** field is required. If any other action is selected, no note is required in the **Action taken notes** field.*

7. Tap **Save** to save the Missed Visit Information.

Cancelled visits will be removed from the Caregiver's Visits List and will be marked as **Unable to Complete** in the Mobile Caregiver+ Provider Portal.



The visit scheduled for Sunday, April 3rd, 2022, from 4 – 7 PM, has been removed from the top of the list.

Completing a Visit When you are Offline

You are here: [Mobile Caregiver+](#) > [Managing Visits](#) > *Completing a Visit When you are Offline*

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

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

You cannot log in to the Mobile Caregiver+ application without an Internet connection.

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.

Visits cannot be scheduled from the Mobile Caregiver+ mobile application while the device is in OFFLINE Mode.

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

Mobile Caregiver+ 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 when the application has switched to OFFLINE Mode. Mobile Caregiver+ will automatically switch back to Online Mode when it detects an Internet connection.

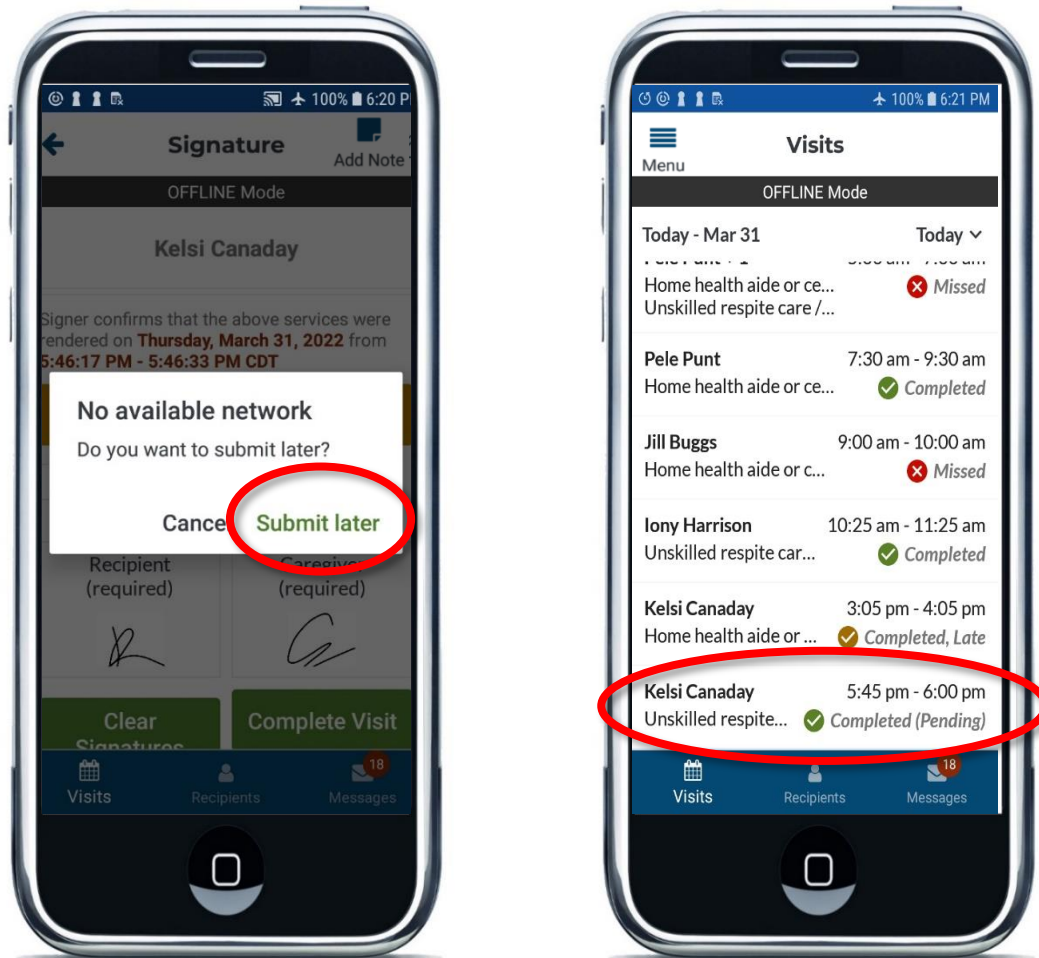
Caregivers can complete visits as they normally would in OFFLINE Mode; when Caregiver tap the “Complete Visit” command to upload visit data, the system will display a notice that there is no network available to connect to the Internet; the application will give you the option to “Submit later:”

When you tap Submit later, visit data is encrypted and stored on your device until you return to a location with internet connectivity.

When connected to the Internet, the Mobile Caregiver+ application will automatically transmit all encrypted pending visit data to the Netsmart EVV Server. Your Provider Admin cannot view visit data from your mobile device until you reconnect, and the information is uploaded.

To complete visits in offline mode:

1. Start and complete the visit as you would normally. See [Starting and Ending a Visit](#) if you need help.
2. Tap Submit later.

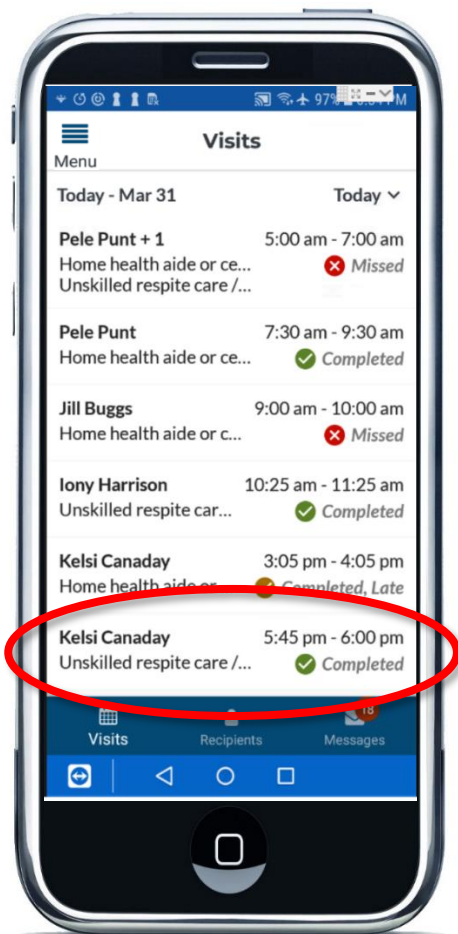


9. **Warning:** While operating in OFFLINE Mode, do not logout of Mobile Caregiver+ until you have completed all visits scheduled to be done in OFFLINE Mode; Caregivers will not be allowed to log into the application without Internet connection.
10. After you complete the visit, a dialog box opens, stating there are no available networks to connect to the Internet. The system will prompt you to confirm that the visit data will be submitted later.

Note: Remember, your Provider Admin will not see visit data until you log into Mobile Caregiver+ from a location that has Internet connectivity.

Visit completed in OFFLINE Mode will be displayed in the mobile application's Visits List with a status of "Completed (Pending)."

3. The next time the User connects to the Internet and logs into the Mobile Caregiver+ application, the system will automatically upload all locally stored visit data to the Mobile Caregiver+ Provider Portal.



Related Topics

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


Adding Visit Notes and Sending Alerts

You are here: [Mobile Caregiver+](#) > [Managing Visits](#) > *Adding Visit Notes and Sending Alerts*

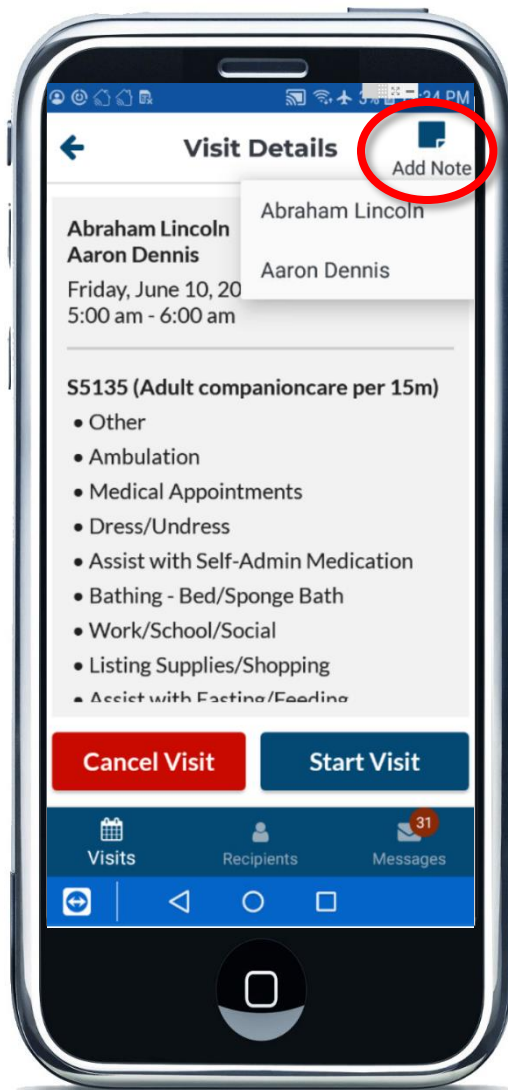
You can add visit notes by opening any visit scheduled for a Recipient. Urgent notes can be marked as alerts and be sent to the Provider Admin as HIPAA compliant text messages. The only requirement for adding a note for a Recipient is, you must add the note by opening a scheduled visit for the Recipient. A note can be added to a future visit, completed visits, missed visit, or any other type.

Warning: *You must adhere to your Agency's and/or Payer Rules and Policies when using the mobile application. You must follow any rules set by your agency and/or Payer regarding adding notes.*

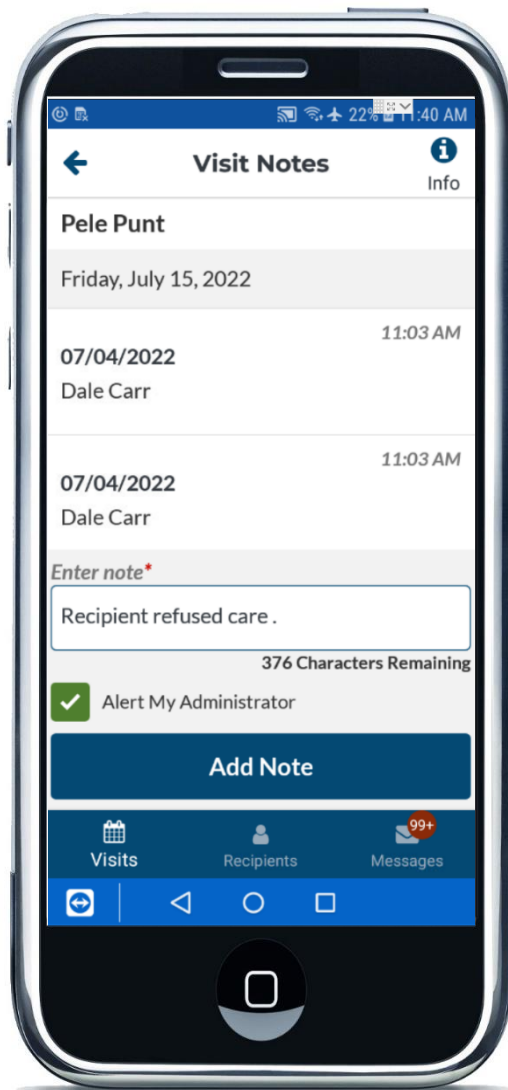
To enter a visit note:

1. Tap on any visit scheduled for the Recipient for which you want to add a note.
2. Tap on the **Add Note** icon, , located in the top-right-corner of the screen.

Note: If the visit is scheduled for more than one Recipient, the system will display a drop-down list to allow you to select the Recipient whose EVV Record you want to add a note to.



3. Type out the note you want to add in the Note field on the **Visit Note Dialog box**,



4. If you want the note sent 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](#)


Adding Service Notes for Assigned Services

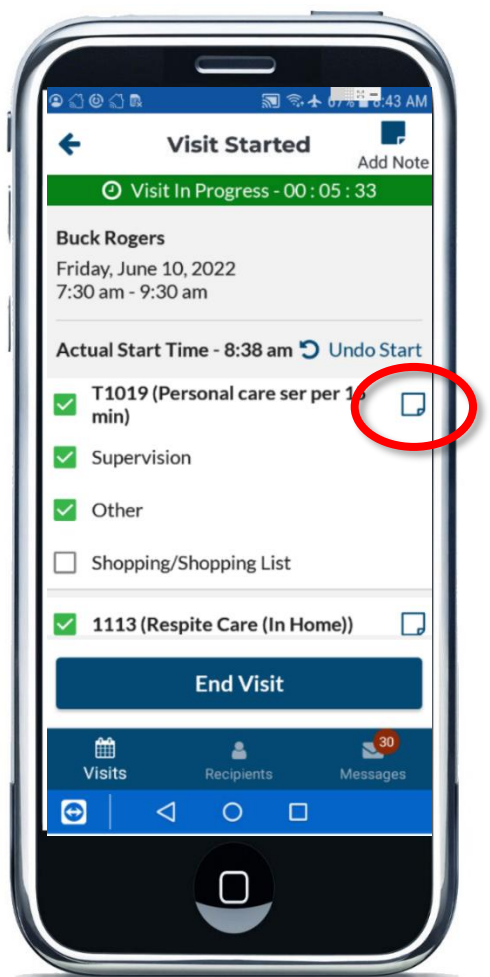
You are here: [Mobile Caregiver+](#) > [Managing Visits](#) > Adding Service Notes to Assigned Services

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

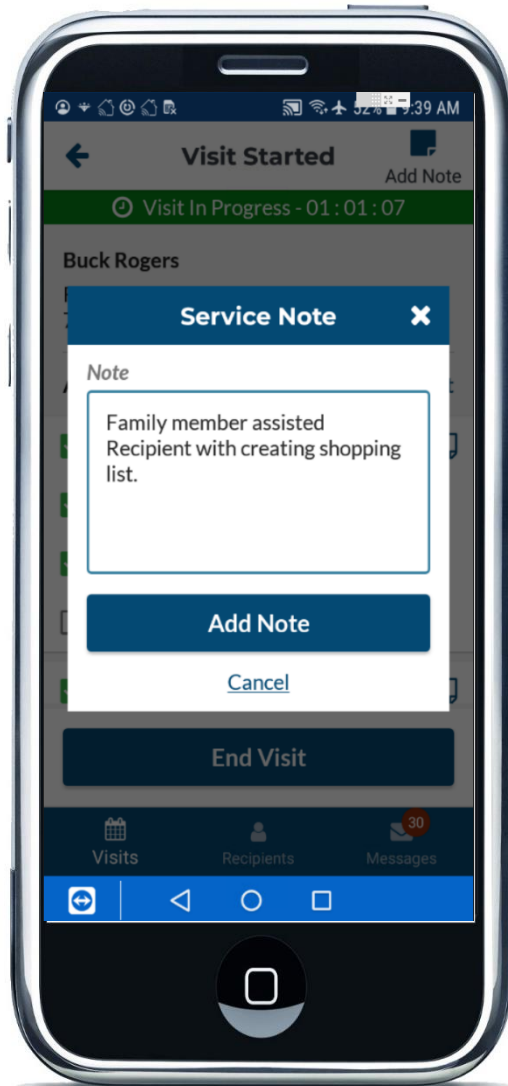
Warning: You must adhere to all rules set by your agency and/or Payer regarding adding notes.

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.



Related Topics

- [Starting and Ending a Visit](#)
- [Completing Visits in Offline](#)


Editing Existing Service Notes for Assigned Services

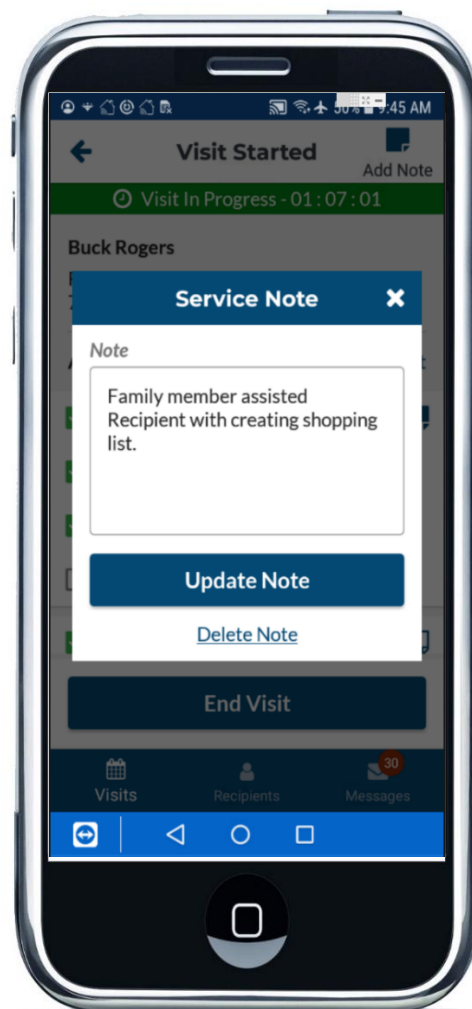
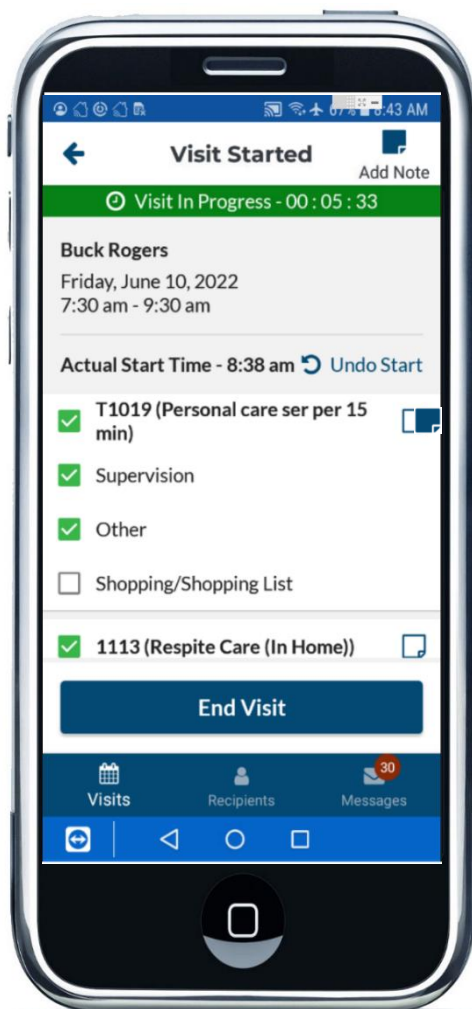
You are here: [Mobile Caregiver+](#) > [Managing Visits](#) > [Editing Existing Service Notes](#)

*****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 your Agency's and/or Payer Rules and Policies when using the mobile application. You must follow any rules set by your agency and/or Payer regarding notes.

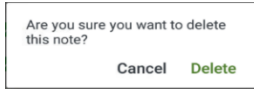
To edit an existing note for a Recipient:

1. Tap on the **Edit Service Note** 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.

*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](#)

11. [Completing Visits in Offline](#)