SMART Therapy Training Manual

Introduction, Month View, TX Planner, Scheduler, Reports & Alerts
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SMART is a software program that allows the user to account for the time they spend each day. Time can be billable treatment, travel between facilities, documenting, or a variety of other tasks. SMART can use the entered information to automatically generate reports, gather outcome data, schedule treatment, create a resident specific log of treatment for the medical record and generate an invoice to track the services provided. One of the prominent advantages of SMART is the ability of the user to enter their own time, therefore eliminating duplicative tasks and the potential for human error.

Because the SMART system doubles for payroll in addition to billing, it is imperative that the data entry is done daily. Once familiar with SMART, it is estimated that charge entry will take roughly 30 seconds per resident.

LOGGING IN

To log into SMART, double-click the SMART icon.

Type the assigned username and password into the labeled boxes. Click on the LOGIN button.

Note: The username and password will be provided the first day of training. Some companies require a secure password format. If your company requires this the format will be as follows: at least 6 characters in length, at least 1 capital letter, 1 lower case letter & 1 alpha character.
You can click on CHANGE PASSWORD before or after you enter your information to change or renew your password.

Note: If username and password entered do not click on the LOGIN button. Clicking on the LOGIN button will initiate the log in and then you’d have to close SMART and re-open it to have the Change Password option.

Type information in the Username, Old Password, New Password, and Re Enter Password text fields. The Username remains the same. Then click on the SAVE button to set new password. Once it is saved the log in process finishes.

SMART will take a few seconds to load. Occasionally, SMART will automatically load new updates. When this occurs, SMART loading time may be extended briefly.
The login screen also allows the user to reset their own password. New users will be prompted to complete a set of questions that will be used to validate the user's identity before allowing a password to be reset.

User will enter in DOB, last 4 digits of SSN, choose a secret question and enter in the secret answer.

If the user forgets their password, upon login click on the forgot password link.

After the information has been accurately entered and validated a window will display for the user to set a new password.
Upon logging in, the first screen that appears displays the available modules the user is authorized to use. Below each modules are programs available for the user.

To switch to a different module, click on the name of the module at the top of the screen. Each new module will give you new programs.

To switch programs within the module, click on the name of the program at the top of the screen.

Smart will always login the user to the last facility the user accessed. This facility can be viewed on the Black header at the top of the screen. This example displays a user logged into Facility 10- Sunny Heights.

The current user logged into the system is displayed in the upper left corner of the screen.
Users may treat patients at several facilities. SMART allows easy navigation from one facility to another to assist with billing.

To switch to another facility, click on the Change Facility link to open the Facility Select Box. A list of the facilities will appear – the display is based on the user’s security permissions.

Click on the facility name to select it. Then click on the Select button at the top of the window to save this facility to the list.

The new facility appears on the screen with that facility’s residents. The user is able to navigate back and forth between facilities during charge entry.
MONTH VIEW

The first screen that appears for all users is the Month View program. Month View displays a summary of the user’s time. Time spent delivering direct treatment, any benefit time taken, and the number of residents treated per day.

Screen Review

To navigate to a different date, simply click on a day in the calendar or on the Month View screen.

- Use the Arrow buttons in the calendar to switch to a different month.

When a date is selected, SMART frames this day in green. The present date is framed in red.

In the bottom left corner of the screen, each day that is selected will display the residents that had treatment for that specific day and the facility number. The treatment minutes for each resident in the resident list will display the total minutes provided by the therapist in parenthesis, and then list the total group minutes provided by the therapists in brackets. In the example below the therapist treated the patient for 60 total minutes with 45 of those minutes billed to the group CPT code.
OVERVIEW

The Month View screen doubles as a time card for payroll. Each day on the calendar shows a summary of the activity for the day.

**Time** - This line links to the time card function.

**Resident** - This line displays the number of patients treated by the therapist.

**Tx minutes** - This line displays the amount of minutes provided to the residents.

**Prod** - This line displays the treatment minutes divided by the time in the facility.

---

Please complete your time card for the following days: 03/17/2009 03/18/2009 03/19/2009

When a user has entered treatment time, but has not entered their time on the Time Card for that day, a reminder will display on the month view screen. As soon as time is entered for the specified day the reminder will remove itself.
Begin by selecting today's date. To enter time click on the blue word 'Time', or select the Set Time link.

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
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<tbody>
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</table>

**What do you want to do?**
1. Set Time - 03/16/09
2. Print Timesheet - 03/16/09
3. View Open Request
4. Open Request
5. Print Schedule - 03/16/09
6. Set Availability

**Customer**
- Resident
  - Beth Clark (55)
  - Karen German (34)
  - Simba Cel (49)
  - Carrie Abbott (35)
  - Nick Lawson (66)
  - Linda Lou (45)

**For non-urgent questions email**
support@casamba.net

Casamba Help Desk 818.991.9111

Please complete your time card for the following days: 03/17/2009 03/18/2009 03/19/2009

**Impersonate**

**Impersonating:**

**Not Active**
The Time Card opens and displays the facilities in which the user has provided treatment for the day. This area displays the detail for the Therapist’s day. The Resident Time Individual is brought in from charges entered on the TX Input screen and cannot be typed in. The Therapist can enter time into the other areas of the Time Card in white to detail the rest of the day.

Timecard options are determined by job codes. Each job code can be customized by the client.

To enter information on the timecard, the staff will begin by entering in the Time In and Time Out for the day for each Facility worked in that day. Do this by clicking on the Time in-Out button.

This screen displays an area where the Time In and Out can be recorded. Simply record the time the Therapist began work and ended work. The Total Time will display at the bottom of the screen. When complete, click on OK and the screen will close.
The screen now displays the total for the Time In - Out and the Paid Work Time for the day.

The user will now distribute the time into the timecard options. The Time in-Out must match the Facility Time line on the timecard. If the time is not fully distributed a window will appear notifying staff of the time left to distribute.

| Group versus Individual Treatment Minutes: |

Therapist Time Group Therapy - Therapist will enter in the total time they physically spent performing GROUP therapy for the day. Productivity will give credit for all minutes actually billed on the TX Input screen but for time card purposes the amount of time entered here is the amount of time it took to perform the GROUP.

Example: Therapist bills 6 patients 60 minutes each for group. Smart will not know if they did 3 groups of 2 or 2 groups of 3. In these scenarios the staff either spent 2 hours for group or 3 hours for group. Depending on how they performed the groups the amount of time of 2 hours or 3 hours would be entered in the timecard section for Group time.

Resident Time Individual does not include the group minutes.
Once the time has been distributed the user can click on the Save button.

**Note:** White boxes are accessible for typing. Gray boxes are locked and SMART automatically calculates the numbers.

Example of a timecard using Premium & Mileage options:

Simply record the time the Therapist began work and ended work. The default rate will pull to the screen automatically. If another rate is needed, select that rate from the drop down box. When complete, click on OK and the screen will close.
The situation may arise when time should be allocated to a facility, but treatment was not provided.

Start by clicking on the Add Facility button.

A list of facilities where the user has been authorized to work will display.

Click on a facility name to select it, and then click on the Set button at the top of the box to save this facility to the list.

Note: Contact your manager if the facility that is needed does not appear.
The additional facility that was selected now appears on the screen ready for time entry.

To switch to another facility in the Time Card, simply click on the facility number.

Each Facility that was worked in must have the Time In and Out completed in order for Payroll for the day to be complete.

Note: Remember to click on the SAVE button after making all entries. If the user clicks on the CLOSE button, the screen will close without saving the entered information.

Timecards can also be locked after a payroll cycle. If the DAL screen has been approved then the staff will be unable to make changes to the timecard. This can only be unlocked by certain permissions.
TIME OFF

All time off must be requested in Smart and approved by a manager before the time will appear on a Time Card.

ADDING A REQUEST

Begin by selecting the Open Request link.

This screen is used to display the history for all time off requests the user has made. The user can search for specific dates or date ranges by using the Filter by Date area and clicking on the Load button.
To add a new request, click on the Open New Request button.

The Time Off Request window opens. Enter the date of the request by using the date button.

Select the type of request by clicking on the Time Off dropdown.

Enter the amount of hours for the request and click on the SAVE button.
Now the Open Request displays on the list.

The Show Open Request Only check box allows a user to only view the requests that have not yet been approved.
REMOVING A REQUEST

To remove or edit a request after it has been saved, double click the request.

Once a request is selected it will become highlighted and the Time Off Request window will open.

To remove a request, click on the Remove Request button.
All requests must be approved before they will appear on the time card. Approving permissions for Time Off Requests are set by the client.

Begin by selecting the View Open Request link.

Tip: Based on the user, the option of View Open Request may not be available to those who are not authorized to approve time off.

Open requests for individuals specific to the assigned Team Leader are listed. Use the Filter by Dates to show request for a specific date range. A specific user can be selected from the list to see only that individual’s requests.

Use the Select Location box to select the facility.
To approve or deny a request, double-click on the line item.

Enter the Approved hours and any comment, then click on the SAVE button.

If denying the request, enter ‘0’ in the Hours field.

Once saved, these hours will appear on the individual’s time card.

**TIP:** A setting exists for allowing or disallowing a user with permission to approve time off to approve their own time off requests. This setting is based on the client set up.
PRINT TIMESHEET

To print a summary of all the time spent in all facilities for a selected month, click on the Print Timesheet link.

To print a summary of all time entered for the selected month not including facility time, click on the Print Schedule link.

The Print Timesheet will show all minutes worked in all facilities for the selected month.

The Print Schedule will show all minutes scheduled in the selected facility for the selected month.
This function is used to impersonate another person’s time entry for payroll. The ability to use this function is permission driven. The list of users you can impersonate is determined by the locations where you have permission to approve payroll.

At the bottom of the month view are two buttons: One to impersonate and one to un-impersonate, which returns the user back to their Month View session.
Clicking on the impersonate button will open a Therapist List window

To use this screen enter the first name, last name of the impersonated person and click on Search.

![Therapist Select Window](image)

**Note:** This list will only return users that you are able to enter time for based on the locations you have permission to approve payroll.

Click on a Name and then click on Select.
The window will close and return to the Month View screen as the user selected.

Now you are logged on as the user selected and can enter time for them.

Notice how the screen has changed with this users already saved information.
The Planner screen is located under the Tx Tab. The planned minutes flow to TX Input screen as well as to the Scheduler.

The Planner is used to plan the amount of minutes of therapy the resident will receive in any given week. The first day in the planner will always be today. Today’s date will be displayed in a red box.

Open Therapy Admissions will display in Red.
Use the arrows in the history box to see the minutes actually provided in the past. The dates in grey display Actual Therapy provided to the resident in the past. The past data cannot be altered on this screen. The dates in white represent future planned minutes.

In the example above 1/1 & 1/4 display minutes in grey - these minutes are the actual minutes that have been provided since these dates are in the past. The dates of 1/12 forward are displayed in white - these minutes are planned minutes in the future.

To return to today’s date, click on the calendar button located at the top of the screen.
The top area of the screen displays the Date, Payor, Payor Day, RUG level if applicable, Grace Days, ARD info such as Lookback Days, Potential ARD dates, and ability to set the ARD information.

<table>
<thead>
<tr>
<th>Payor</th>
<th>Fri 1/1</th>
<th>Sat 1/2</th>
<th>Sun 1/3</th>
<th>Mon 1/4</th>
<th>Tue 1/5</th>
<th>Wed 1/6</th>
<th>Thu 1/7</th>
<th>Fri 1/8</th>
<th>Sat 1/9</th>
<th>Sun 1/10</th>
<th>Mon 1/11</th>
<th>Tue 1/12</th>
<th>Wed 1/13</th>
<th>Thu 1/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payor Day</td>
<td>3 4 5 6 7 8 9 10 11 12 13 14 15 16</td>
<td></td>
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<tr>
<td>RUG</td>
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<tr>
<td>Grace Days</td>
<td>GRD GRD GRD GRD GRD GRD GRD GRD</td>
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<tr>
<td>ARD</td>
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</tbody>
</table>

The middle gray area of the screen displays actual minutes provided for the past dates and the white boxes are accessible for planning minutes for the future.

| PT | 45 60 65 60 60 60 |
| PT Group | |
| OT | 30 45 45 45 45 |
| OT Group | |
| ST | |
| ST Group | |

This area displays 7 day totals and a calculated RUG using a combination of Actual Treatment minutes and Planned treatment minutes.
Smart will review the assessment window and highlight the first optimal day within the range. The example below displays for the 14 day assessment range, the first optimal day is day 11 & for the 30 day assessment range, the first optimal day is day 23.

A summary of the selected ARD’s for the patient are in the lower left corner.

- Projected ARD: Displays the ARD date set by user.
- Projected RUG: Displays the RUG level set by the user.
- Calculated RUG: Displays the calculated RUG level for the Projected ARD date.
- Best ARD: Displays the 1st optimal date for the ARD for the assessment period
- Best RUG: Displays the Calculated RUG level for the Best ARD date
- Reported: A check box is displayed to select when the ARD/ RUG level has been reported. Upon selecting the Save button if the Projected RUG and Calculated RUG do not match a window will display for a reason to be entered. A report will be created for the reason at a later time.
The 7 day look back totals will adjust as the plan is being entered. If a day’s total is displayed in RED, then the total was reduced to ensure group time does not exceed 25%. To view the original values, place the cursor over red text.

**UNPLANNED**

Choose Unplanned from the resident list to view the residents who have not been planned.
Auto Planner will be initiated after hours & identify which residents are in an assessment based on the ARD chosen. It is important that ARD’s are preset for this feature. If minutes were missed for the day, the auto planner will move the under delivered minutes to the next day. It is important that therapists enter charges before leaving the facility each day or minutes may unnecessarily be transferred to the next day. Corrections can be made by returning to the TX Planner & adjusting the minutes.

Example: ARD is set for tomorrow. PT plan for today is 60 & OT plan for today is 45. PT treats for 55 minutes & OT treats for 45 minutes. The auto planner will move the 5 minutes missed by PT to the next day’s planned minutes.

The system will not reduce minutes. If minutes are over provided on Monday the system will not adjust the plan for Tuesday. Manual adjusts can be made on the planner screen if needed.
Planning can be manually entered. The circled area displays the location to manually enter planned minutes for the future. Group and Individual Minutes each have designated rows.

Click on the patient name and enter in the future plan minutes. Note the projection recalculating as minutes are planned. The projections for the resident change based on the planned minutes and days.

After entering in the plan and verifying the projections click on SAVE. To start over, click on the resident names and the planner will be refreshed. This will remove the minutes you entered.

If a plan is already saved and changes are desired: Click in the box and type the new minutes.
Once data is entered, there is a clone option. Select Copy Schedule to enter the number of weeks to copy the plan. Enter the start week and number of weeks to continue. Click OK.

The plan will clone.

Be sure to click on SAVE in order to save your changes.
The RUG Planner is another option to complete the planner. The Facility type must be set in Facility Maintenance as SNF for this button to appear on the screen.

A RUG plan can be created by assigning specific variables. The variables assigned will develop the plan and distribute the plan appropriate to the RUG Planner. This feature eliminates day to day calculating/planning and automatically plans minutes either at the Rug level or approximately 5% over the Medicare minimum minute requirement for each RUG level. This can be set based on client specifications to either choice.

To use this feature, click on Rug Planner. A window will appear.
Select the desired RUG level.

Select each Discipline(s) ordered and the Frequency prescribed.

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<table>
<thead>
<tr>
<th>Discipline</th>
<th>Days per Week</th>
<th>Priority</th>
<th>Even Distribution for all Disciplines</th>
</tr>
</thead>
<tbody>
<tr>
<td>PT</td>
<td>3</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>OT</td>
<td></td>
<td></td>
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<tr>
<td>SLP</td>
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</tr>
</tbody>
</table>

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Step 1. Please select the RUG level you would like planned.

Step 2. For each discipline, select how many days per week, and the priority for how minutes should be distributed.

Step 3. Please select the Begin Date for this plan 10/19/2007

Step 4. Please select the amount of weeks in to the future for this plan 1

---

Plan  | Cancel
Select the desired minute distribution. Options include for minutes to be Evenly Distributed or by assigning priority minutes to specific disciplines. For example, with the RUG set at Very High, OT can be assigned Most Minutes (60) and PT Second Most (45).

***Tip: Weekends are only planned when using the 6 or 7 day frequency. 6 day a week will automatically plan those minutes on Saturday. The RUG Planner can be utilized in combination with adjust the minutes manually, as needed. If the setting is 5% overage, then the planned minutes will reflect a cushion of approximately 5%. If the setting is turned off, then the planned minutes will be the exact minutes for the RUG category being planned, as published by the MDS Manual.

***Tip: If 6 or 7 day frequencies are desired, the Priority must be Even.
OVERVIEW

The purpose of the Scheduler function is to schedule the staff as well as to offer a printable schedule. The schedule will clone from 1 day to the next. It is necessary each morning to validate the minutes in ( ) against what is on the scheduled minutes column. Changes or adjustments can be made based on the minutes in ( ). If the schedule is saved for Tuesday on Monday evening then the Auto Planner has not run. Therefore it is important to facilitate this task each morning. If the schedules are saved in advance then each morning validate if the Auto Planner made any changes in the ( ). (45/15) represents 45 individual minutes scheduled for 45 and 15 group minutes.

There are several options for the scheduler:

1. Use minutes from the Planner Screen- The minute’s column can populate based on the planner or can clone from last saved schedule.

2. Require start and stop times- If start and stop times are required the minutes column will auto populate based on the times entered. If start and stop times are not required, staff are still able to enter in a start time but not an end time.

3. Show documentation due- Will display on therapist schedule documentation that is due such as 700/701 or progress reports.

4. Show documentation precautions- Will display the precautions from the last saved document from all 3 disciplines on each discipline schedule.

SCHEDULING RESIDENTS

Go to Scheduler under the TX menu.
Use calendar & enter today’s date

<table>
<thead>
<tr>
<th></th>
<th>Payor</th>
<th>Start Time</th>
<th>End Time</th>
<th>Min</th>
<th>Primary Therapist</th>
<th>Therapist</th>
<th>Equipment</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Abramson, Abi (65/0)</td>
<td>MedA</td>
<td>65</td>
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<td>*Adams, John (15/45)</td>
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<td>*Alm, Sarit (65/0)</td>
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<td>65</td>
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<td>MedA</td>
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<tr>
<td>Smith, Joan</td>
<td>MedA</td>
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<tr>
<td>Smith, Mary</td>
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<tr>
<td>Ward, Rachel</td>
<td>MedA</td>
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<tr>
<td>Wilkins, Thomas</td>
<td>MedB</td>
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<tr>
<td>Williams, Julia</td>
<td>MCaid</td>
<td></td>
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</tr>
</tbody>
</table>

Each discipline tab will display the current open caseload.

The patient name, planned minutes and payor will display.

(15/45) represents 15 individual minutes plus 45 group minutes.

Names in RED represent the residents who are in an assessment period based on the ARD date preset.
Verify the minutes scheduled to the minutes in () which are the planned minutes & make changes. Adjust the therapist to treat if necessary. Save and print out schedule.

***Tip: If the minutes in () are not the desired minutes to schedule for the day & the patient is in RED- the minute column can be changed BUT make sure to return to the planner and adjust the planner so that the auto planner will not move the untreated minutes. Example: (100/0) and minutes column is changed to display 60. Go back to the planner and change today to 60 minutes. Verify the 7 day look back still displays accordingly or adjust other days in the future in order to meet the category.

If entering in a start time manually, make sure to enter as 8a or 2p.

Primary Therapist- This is not a mandatory field. Typically is used for who is responsible for supervision and recertification’s. This can also be used to insert the primary therapist for treatments.

Therapist- Use the dropdowns to assign the therapist to treat the resident for this day.

Equipment- Free text box. Can use for any information needed to flow to printed schedule. Use abbreviations as much as possible as the field is not very large. Examples:  CP 10a= Care Plan 10am

If the patient name does not display any minutes in () this alerts the staff that a plan for either 0 minutes was set on the planner screen or that a plan was not set at all for the resident.

Therapists’ center column- Displays the therapists who have been assigned residents and the total amount of treatment minutes.

Schedule for column- Displays the highlighted therapist and their individual schedule.

Add Resident- If you have a new eval/ screen, etc and wish to place this on the schedule, click on Add Resident. The resident must be already set up in TX Resident screen. In order for the resident to display assign minutes and a therapist.

To remove information- click in the box and then backspace.
The schedule screen can be sorted by patient name, payor, time, minutes, primary therapist, therapist or equipment columns. The example below displays the sort on Therapist column. Only 1 column can be sorted. This can be helpful when printing a resident schedule or to quickly change a therapist schedule who is sick and assign all the patients to another staff member.

**ALL TAB**

The scheduler displays an interdisciplinary tab called ALL where all three disciplines schedules will appear.
CONFLICTING SCHEDULES ALERT

When a resident has been scheduled for one discipline at the same time as another discipline an alert will pop up for confirmation. Press OK and either leave as is if valid, or Press OK and change the start time for one of the disciplines.

Note: This feature will only work if utilizing start and end times for scheduling.
Two types of schedules are created: Therapist Schedule or a Resident schedule.

Therapist Schedule example:

---

**Daily Therapy Schedule**

**Therapist:** Assistant, Test  
**Date:** 03/19/2009

**Note:** The Rehab Aide should be scheduled to come in early to begin patient transportation prior to the first schedule appointment.

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Sched. Minutes</th>
<th>Loc</th>
<th>Patient Name</th>
<th>Planned Minutes</th>
<th>Payor</th>
<th>CPT Codes</th>
<th>Minutes / Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due: 700</td>
<td>45</td>
<td>433</td>
<td>MedB</td>
<td>Chen, Sue (45/0)</td>
<td></td>
<td></td>
<td>90465 - Immune admin 1 inj. &lt;</td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>97010 - Hot/Cold Packs</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>97016 - Paraffin Bath</td>
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<tr>
<td>Due: 700</td>
<td>45</td>
<td></td>
<td>MedA</td>
<td>Miles, Samuel</td>
<td></td>
<td></td>
<td>90465 - Immune admin 1 inj. &lt;</td>
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<td></td>
<td></td>
<td></td>
<td>92504 - Ear microscopy examination</td>
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<td></td>
<td></td>
<td></td>
<td>97010 - Hot/Cold Packs</td>
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<td></td>
<td></td>
<td></td>
<td>97530 - Therapeutic activities</td>
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<td></td>
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<td>97532 - Cognitive Skills Developmer</td>
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<td></td>
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<td>97535 - Self care training.</td>
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<td></td>
<td></td>
<td></td>
<td>99998 - Oasis</td>
<td></td>
</tr>
<tr>
<td>08:00</td>
<td>09:05</td>
<td>65</td>
<td>MedA</td>
<td>Abramson, Abi (65/0)</td>
<td>326</td>
<td></td>
<td>97110 - Therapeutic exercise</td>
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<tr>
<td>Due: Progress Report</td>
<td>10amCp</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>97112 - Neuromuscular re-ed</td>
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<td></td>
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<td></td>
<td>97116 - Gait training</td>
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<td>97150 - Group Therapy</td>
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<tr>
<td>08:00</td>
<td>09:05</td>
<td>65</td>
<td>MedA</td>
<td>Alm, Sarit (65/0)</td>
<td>2191</td>
<td></td>
<td>97012 - Traction</td>
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<td>03/23/2009 5 Day ARD</td>
<td>SV</td>
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<td></td>
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<td>97533 - Sensory Integration</td>
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<tr>
<td>Due: 700</td>
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<td></td>
<td></td>
<td></td>
<td>97760 - Orthotic mgmt and training</td>
<td></td>
</tr>
</tbody>
</table>

**Precautions:** PT - Low endurance - needs frequent rests. Orthostatic hypotension precautions-check vital signs.

**Total Approved Labor Hours:**

**Signature:**

**Date:**

---

Patient names in **BOLD** are in an assessment.

The schedule can be printed out for each therapist by using the Print All button.

Resident Schedule is only available for print and will print exactly what is shown on the scheduler screen.
Click on the Key Factor program under the Tx module.

Insert a From and Thru date, select a facility and press the load button.

The screen will populate with the information for the selected facility. This can also be run for a district or region.

The information is calculated each night and is not live data. Budget amounts to be supplied to Casamba Client Representative.
Medicare Part A:

**RUGs Days**: Count of days for each RUG level

**% of Total Days**: RUG days/Total days

**Budgeted RUG %**: Companies budgeted RUG% for selected facility

**Variance**: Actual – Budget

**Ideal Minutes**: # of RUG days multiplied by the number of minutes needed for the category

- **Actual Minutes**: Actual minutes provided
- **Difference**: Actual - Ideal
- **Eff %**: Actual Min/ Ideal Min
- **Avg Min**: Actual Min/ # RUG days

Medicare Part B:

- **Actual**: Invoiced or Pre-bill Revenue
- **Units**: Invoiced or Pre-bill Units

- **Budget**: Company budgeted Med B revenue for selected Facility

- **Rev/Unit**: Actual Revenue/ Units

- **Variance**: Actual - Budget
Medicare Part B Saturation
Saturation per discipline and total saturation of Med B residents on TX Caseload

Other Payors
TX Min: Actual Treatment Minutes
Rev: Invoiced or Pre-bill Revenue
Budget: Companies budgeted revenue for selected facility

Labor Hours
Actual hours clocked for each discipline and employee type

Non Tx Labor
Actual Team Lead: 40-(tx min/60)
Actual Tech: Actual hours clocked for Tech
Budget: Companies budgeted hours for selected facility
Variance: Budget – Actual

Average Daily Med A Census
Total MedA days / Total Med A residents during time frame selected

SI
Salary / Revenue
Click on the Reports module. Then on the Reports program. The user group permission will dictate which reports the user will be able to access.

Click on #1- Run Report.

The Reports screen will display. Click on the tabs to find the desired report(s) to view. Select a report and click on the arrow to move the report to the Selected Report box. Multiple reports can be selected.

Click Next.
Each report has a set of parameters. Enter in the parameters required for the report. The report is shown in Orange that is currently in view.

To enter in dates- use the calendar.

Select Location- click on select location for a popup to appear where a facility, district, region, division or company level can be selected. Once selected, the window closes and the screen displays the selected location.

Click on Submit report. Repeat above steps for all selected reports. If you wish to skip and not run a selected report, then click on Skip Report.
The reports are now displayed under the My Reports section. Reports with a submitted status are still creating. Once a report has a Created status it is ready for viewing.

Click on a report with a created status and then click on View report. Report will display in print preview.

Refresh View- This can be clicked on to see if a submitted report is finished creating

View Report- This can be clicked on to view a Created report.

Email Report- Click on the email check box next to a report and then on email report. Enter in email address and the report will be emailed.

Delete Reports- Click on the delete check box next to a report and then on Delete report button. The report will be deleted out history.
This is the Message Center. This screen displays system-generated messages. When a system-generated message exists, red text is displayed under the Message button. Clicking on the Message button opens the Alerts.

System Alerts will display and are populated with data depending on the facilities that the user has permission to see.

The System Alerts include those items that need high visibility in the system, for example, those residents who are missing a Payor, RUG, Assessment or Treatments. Clicking on any alert under the subject area will display a summary of the information to be found on the alert.

Click on View and the alert will appear in a report format.

Alerts can also be found on the TX Resident screen. The alert process runs several times per day based on client specifications. Alerts are not refreshed as missing information is corrected. The alert process must run before changes will be displayed.

Refer to Client Quick Cards for alert definitions.

The Message Screen also includes other functionality that is not currently being used.