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Companion User Guide

Document Version 1.3

REVISION HISTORY

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11/07/2014	Sara Maynard	1.0 - Original
08/19/2015	Rachel Alden	1.1 - Updated
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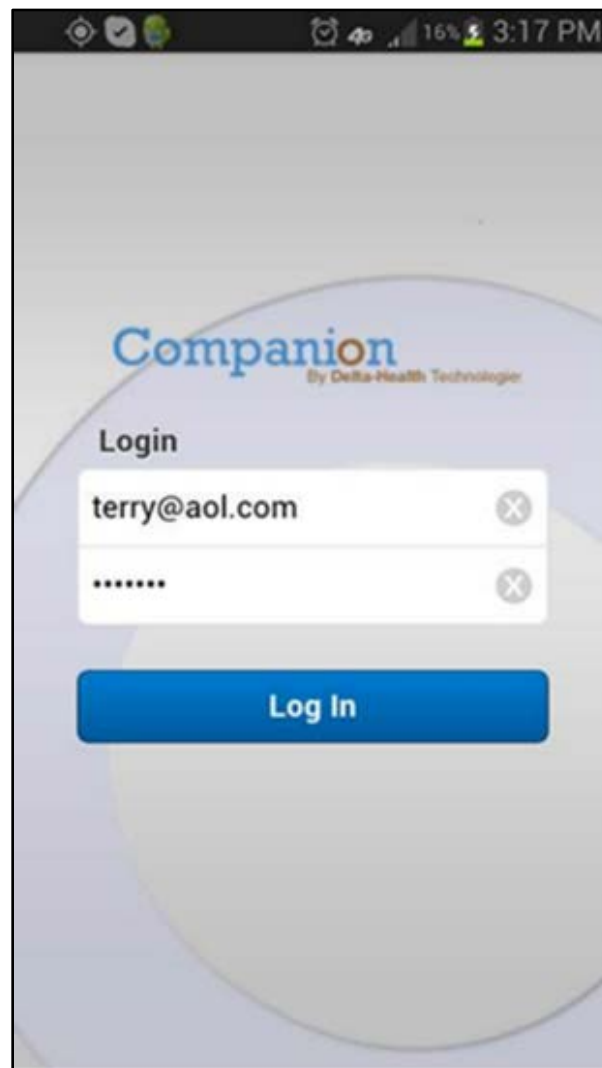
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COMPANION

About AppointMate's Companion

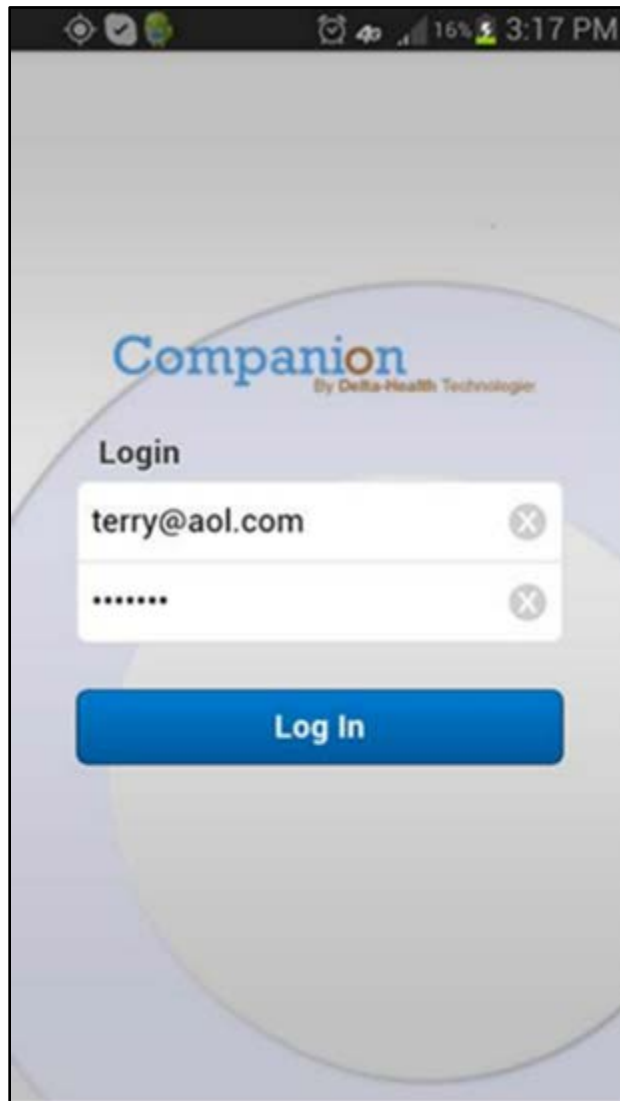
AppointMate's Companion product is a GPS based visit verification tool that caregivers can use on their smartphones. Companion uses GPS to verify caregiver location and can improve care plan compliance when used for task documentation throughout each visit.

Companion is a browser-based application and can be accessed through a smartphone browser on caregivers' mobile phones.



Accessing Companion

To access Companion, the caregiver will use the email and password that is set up in their profile in the AppointMate® program under the General Options panel. These login credentials are also used for the caregiver portal.



Using the email address and password from the AppointMate program allows the office to centrally control Companion access and allows for immediate changes if necessary (e.g. caregiver quits or is terminated).

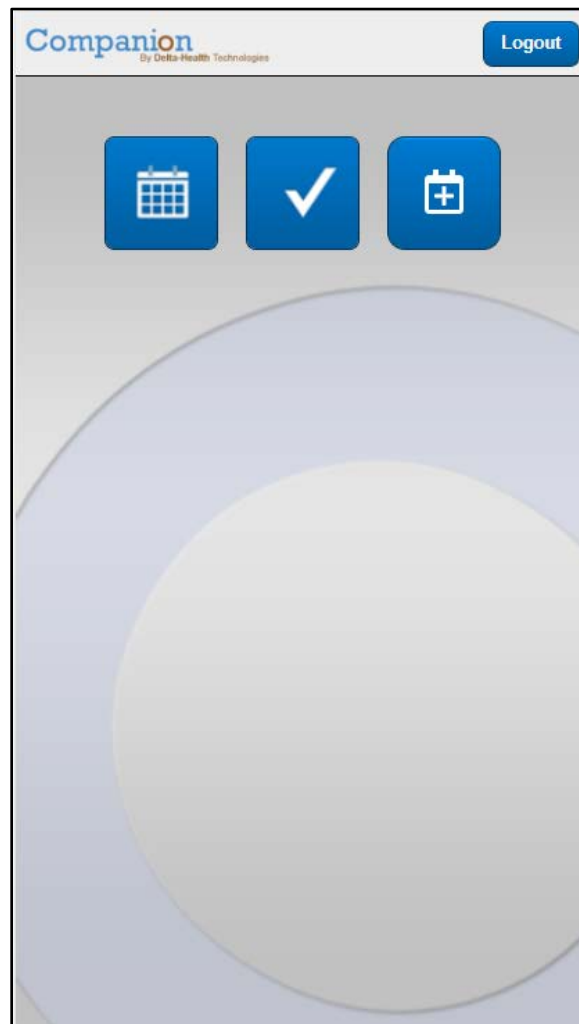
Landing Page

The landing page has role-controlled access to certain functions. The default functions available are:

- **View Schedules**
- **Manage Tasks**

Tasks listed under Manage Tasks will be relevant to the client for whom the caregiver is currently clocked in. If the caregiver is not yet clocked in, no data will appear here.

If the account has the option enabled to allow caregivers to request open shifts, a third option will display on the landing page. With the “Enable Open Shift Request” option enabled, caregivers can request to cover open shifts via Companion. The icon on the far right will allow caregivers to see and request open shifts.

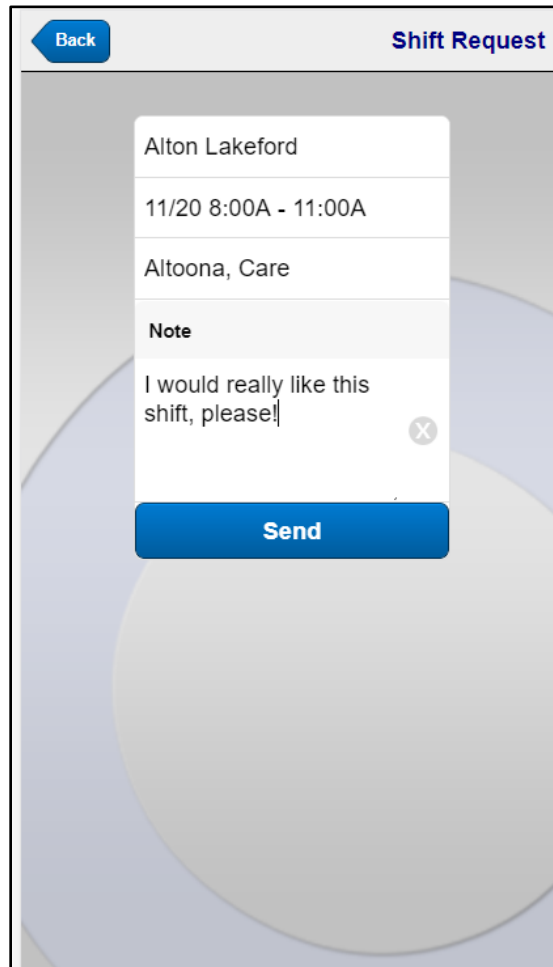


Requesting an Open Shift

If the option is enabled in Admin Tools |General Options |Caregiver Portal to “Enable Open Shift Request,” caregivers can request shifts via Companion. Clicking on the icon that looks like a calendar with a plus will display all shifts that are scheduled to “unassigned” for which the caregiver is not blocked.



To request a shift, caregivers click on the blue question mark to the right of the shift. A box will appear with the shift information. The caregiver can add a note to the request and send the message to the users subscribed to receive open shift request communications.



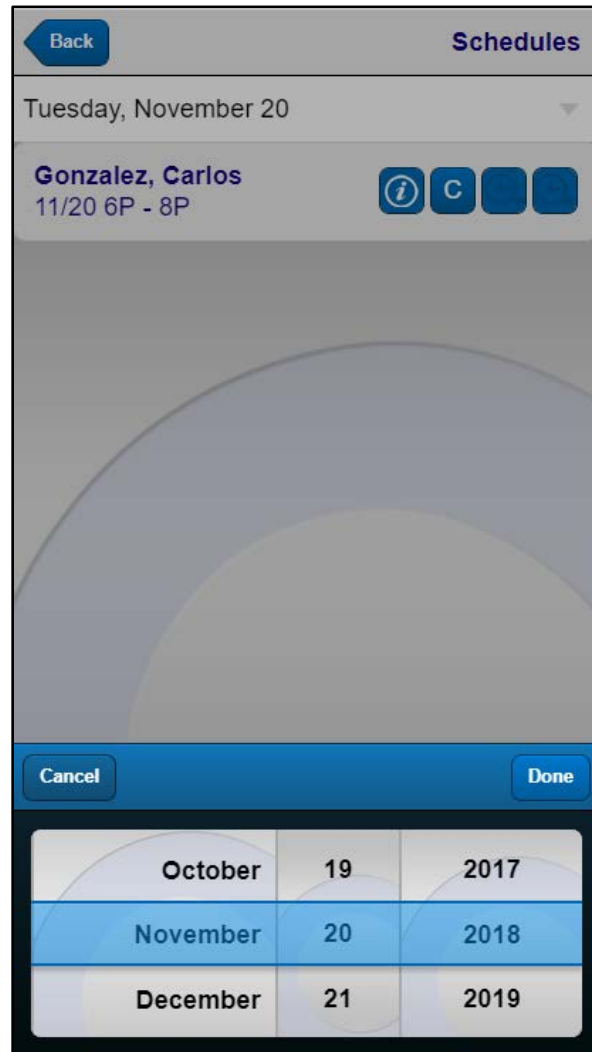
The office user receiving the message can “accept” or “decline” the request. If accepted, the visit will be reassigned to that caregiver. If declined, the visit will stay unassigned.

Clocking In and Out

Clock in and out in Companion is controlled by access and proximity. Caregivers must be within a set distance from the client’s home, based on GPS, to clock in/out for an appointment. The clock in and clock out options are also controlled by the arrival and departure thresholds set up for telephony.

The office can contact AppointMate Support through the Support Portal to set up the distance that is allowed. The default allowable distance is 15 miles.

Caregivers can also view future schedules by selecting the date from the drop-down.



Once the caregiver chooses to clock in/out, Companion will prompt him or her to enter the 4-digit pin located in the caregiver profile under the General Options panel.

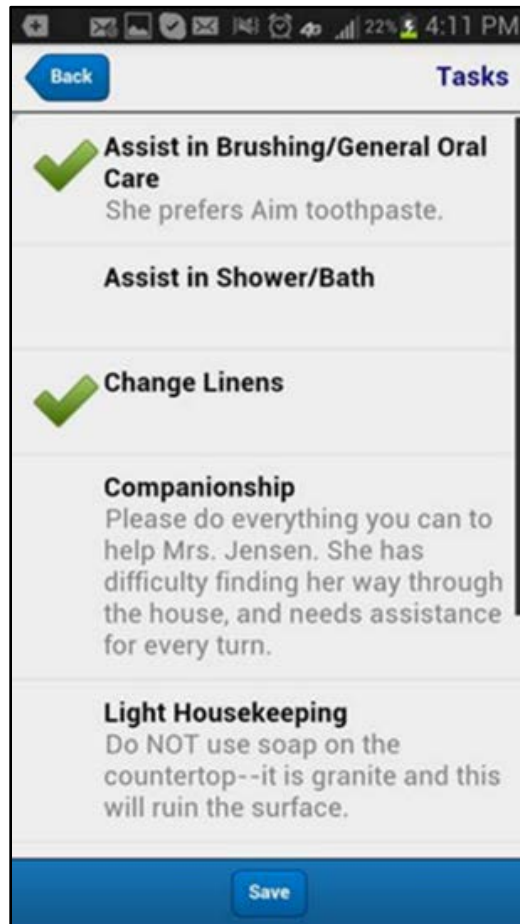


If successful, Companion will check for any tasks the client has assigned to that appointment and display them to the caregiver.

Tasks

Tasks are displayed after clock in and are available at any time during the visit by clicking the Task icon on the Home screen.

Users can see specific comments from the office on any of the particular tasks. Users can also select whether each task was Completed, Not Completed, or Customer Declined.



Mileage Entry

If the account is configured to allow mileage entry with telephony, caregivers will also be able to add mileage via Companion. During the clock out process, there will be the option to add mileage. If the account is setup to enter either errand miles or travel miles, those options will display.

The caregiver will enter mileage, if they have any, and click NEXT on the bottom right corner of the screen. The next screen to display will be the task entry screen. Once tasks and mileage are entered, click SAVE in the bottom left corner of the screen to complete the documentation.

Mileage Entry	
Errand	XX.XX
Travel	XX.XX

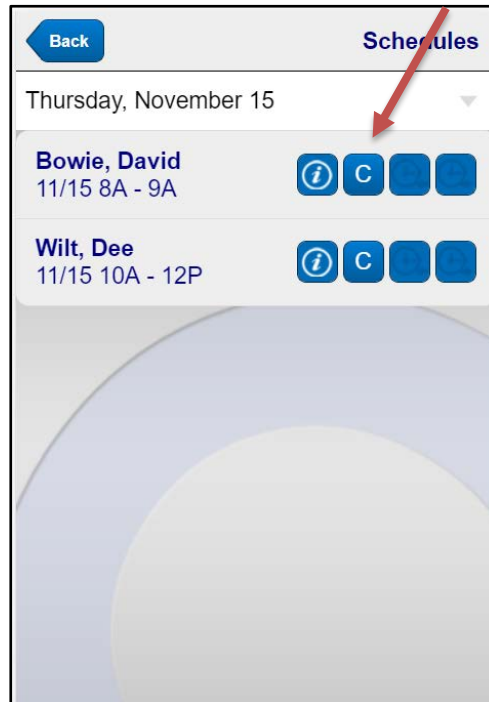
Other Options in Companion

Companion has additional options available.

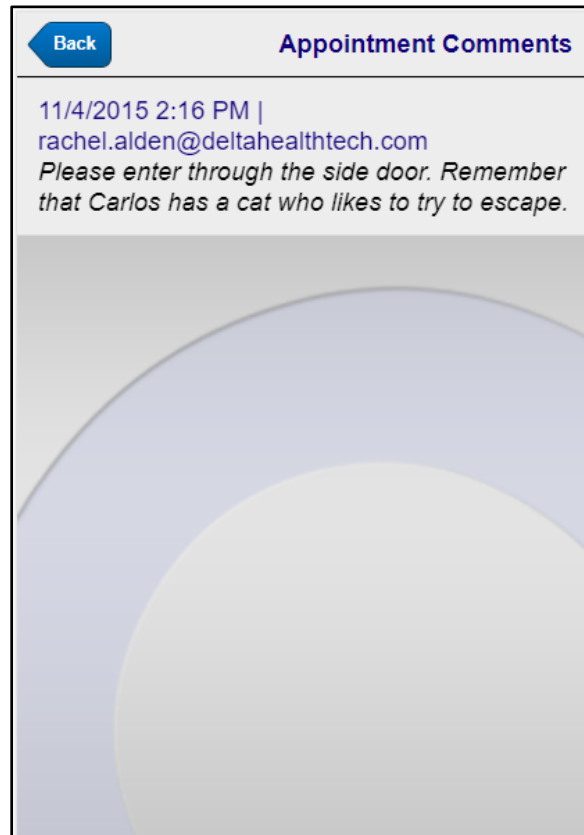
- The Appointment Info screen provides basic information about the visit, including the client address and phone number, the category or type of service, and the status of the visit (confirmed/pending).

Appointment Info	
Customer	Gonzalez, Carlos
Category	Care
Start	11/20/2018 6:00 PM
End	11/20/2018 8:00 PM
Address 1	5808 Maryland Ave
Address 2	
City, St, Zip	Altoona, PA 16602
Phone	(814) 201-8883
Status	Pending

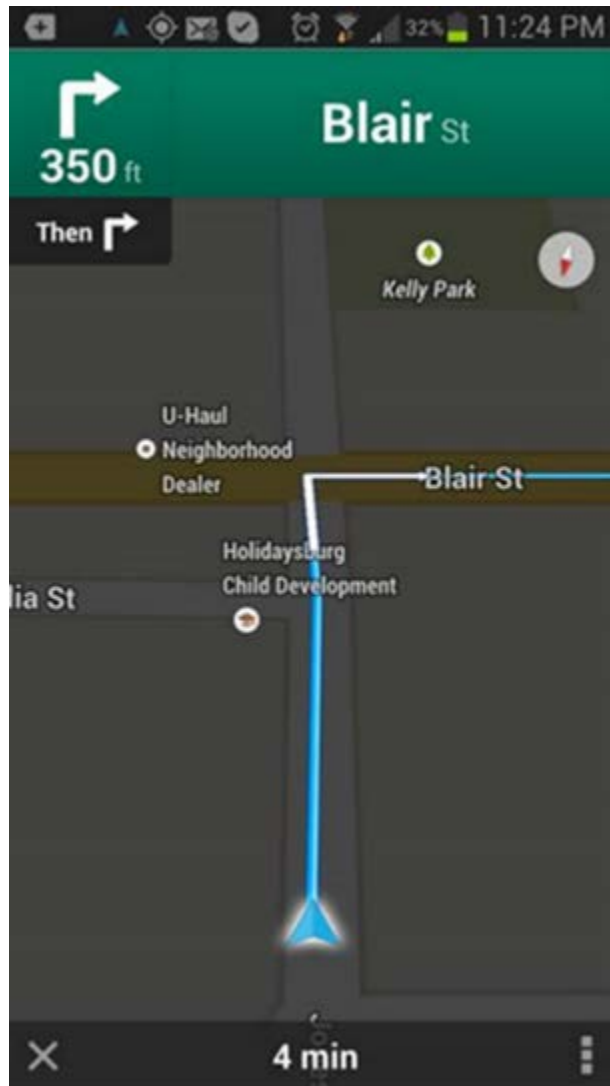
- If the account allows confirmation of visits through the caregiver portal, the caregiver will have an option to confirm shifts. To enable this feature, go to Admin Tools |General Options |Caregiver Portal and check the box for “Enable Confirm Appointments.” When an employee is on the schedule screen, clicking on the “C” icon will confirm visits.



- Appointment notes will be available through the pencil icon on the Appointment Info screen. Important communications about this client and/or visit can be viewed here.



- A one-click option will display a turn by turn map, typically using voice guidance



FAQ'S

1. Why don't my caregivers see tasks?

Companion's task options operate like telephony's spoken task feature which reads the tasks to the caregivers and allows them to document a yes/no/customer refused response for each task after it is read. Both Companion and spoken task entry require that tasks are assigned to appointments to be read or displayed. AppointMate has several options for automating this process.

If you are unsure whether you are configured for spoken task entry and your appointments do not list tasks shown with a checkmark and a quantity of "1," please contact AppointMate Support.

2. Why are the clock in and clock out buttons grayed out, preventing the caregiver from clocking in?

Companion considers the time and GPS thresholds set for your account. If your caregiver is attempting to clock in or out while within the time thresholds set for your account, the error may be GPS or location based.

The default threshold for GPS clock in/out distance is 15 miles. This threshold can be set for your account at increments of a tenth of a mile by contacting AppointMate Support. If your caregiver is the appropriate distance from the client's home and still cannot clock in, there may be an issue with that client's address in AppointMate.

First, ensure that the address follows these guidelines to be recognized and verified by Google Maps™: make sure you are using the USPS address for the location and that additions such as apartment number or suite are located on Address Line 2. Second, select the "relocate" button in the client address section of the client profile. Save GPS coordinates and then save the client's profile. If your caregiver still cannot clock in for that client after following these steps, contact AppointMate Support.

Through AppointMate's integration with Google Maps, addresses will be verified upon save. Any address that cannot be verified will show within the profile with a map icon with a red X. You can correct an unverified address or review and adjust Google's location for the address by clicking on the relocate option in the client profile.

To verify that an address is valid, run the "Client List" report. This can be found in ALL Reports | Client Tab | "Client List". The column labeled VERIFIED will display a "yes" if it is a valid address or "no" if it is not valid. Addresses that are not verified will not be found using Companion.

3. Where do I enter notes that will show up in Companion's Appointment Info?

Notes attached to the appointment within AppointMate will show up in both the Appointment Info screen in AppointMate and in Companion. If you would like to have notes attached to the schedule appear in the appointment as well, Support can enable a setting to allow this.

4. Companion says “Location Not Yet Detected.” How can the caregiver view appointments?

The caregiver must click to allow Companion to have access to their location. Companion asks for this permission each time that the caregiver signs in. If the caregiver mistakenly clicked “no,” they can sign out and sign back in to receive the prompt again. If they clicked to allow permission to their location and they still receive the message, they can refresh the page or re-select the date to force the page to reload.

5. What URL should my caregivers use to access AppointMate on their smart device?

Companion can be accessed at the URL you use to access AppointMate by adding “/companion.” For example: <https://www.appointmate.com/companion>.

6. My caregiver is having trouble logging in to Companion.

Ensure that your caregiver is using the same email address and password saved in his or her AppointMate caregiver profile. Please note that usernames and passwords are case sensitive. If the email addresses and passwords match, contact AppointMate Support.

7. Why do my caregivers have to save their tasks again when they clock out?

Companion allows caregivers to track and save their completion of tasks throughout each appointment. However, like telephony, it will prompt the caregiver to review and save each task upon clock out before sending the information to AppointMate.

8. How should I troubleshoot if my caregivers do not see all of their appointments?

Companion uses the same appointment filter that it set for your employee portal (**Admin Tools | General Options | Employee Portal | Calendar**). The appointments visible in the Employee Portal should also be visible in Companion.

9. Who do we contact with any additional questions?

For any questions about Companion, submit a ticket 24/7 in via our Customer Support Portal or call our Customer Support Team at (800) 444-1651.