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Dial N Document
This tutorial is meant to assist you in learning how to navigate within Dial N Document. Please read through each section before attempting to navigate yourself, as this will give you the best experience. See screen shots at the end of each section to also assist in the navigation and understanding of how Vision Works

Creating Your Password
To create your password, you must call the Dial-N-Document Password Creation number. Once you have successfully created your password, it will be active and can be used to log in to the DND website.

1. Password Creation Line: 877-814-3820
2. Welcome to Dial-N-Document’s Password Creation System. Please enter your access code followed by the pound key. This is your employee ID#
3. Please enter your agency ID followed by the pound key. Enter your agency ID 1105#
4. Please enter a new Password using the digits on the keypad on your phone. The password must be between 4-8 digits in length. Press the pound key when you are finished. Enter a password of your choice following the instructions. Dial-N-Document does not keep record of passwords, so it important that you either memorize the password, or notate it for your reference.
5. Your password has been saved.
6. Your Password has been created. Thank you for calling Dial-N-Document Password creation system. The system will automatically disconnect. You may now use your new Admin. password, in combination with your access code and agency ID to log in to the Dial-N-Document web site.
Logging onto Dial N Doc from your Smartphone

1. On your mobile phone, open your web browser and navigate to the Dial n Doc Mobile Site: www.mobile.dialndoc.com

Creating Link to the DND Mobile Application on your Device Home Screen

**Android Users:**

1. Select the 3 Vertical dots at the upper right corner of the screen.

   ![Android home screen option]

2. Select Add to Home Screen.
3. A box will appear that will allow you to enter a title that will appear with the icon on your home screen. Type in the name of the application and save.

**Iphone/ipad Users:**

1. Tap the Share button from the browser.

   ![Iphone home screen option]

2. Select Add to Home Screen.
3. Select the Add button to add to the home screen.
2. Use the Agency ID, Access Code, and Password created in section above.
3. Once logged on, your client list and tasks will update when you are connected to Wifi or Mobile Data. You will receive a “Updates received” message.

NOTE: Dial N Doc does not require Wifi or Mobile Data consumption after the initial updates are received.

At a minimum, it is required to connect to Wifi or Mobile Data at the end of your shift to ensure the synchronization of Dial N Doc to Vision.

Control Bar

- Back button is used to go back to the previous screen within the app.
- The Home button is used to return to the Main Menu screen.
- Refresh will retrieve updates or send information.
- Log Out
1. To start a visit with a client, simply click on “Start a Visit”.

2. Click on the discipline of “Personal Care Worker”.

![Start Visit](image)

![Choose Discipline](image)
3. Click on “Client Name” to get a list of clients. Then select the client you are about to provide care to.
4. Verify the client name and date/time of service. At this point you can put your phone away and provide the care agreed to.
End Visit

1. Once your care and visit is complete, open Dial N Doc to the home screen and select “End a Visit”.

2. Check off tasks by selecting Yes, No, or Refused. When you are done, press “Continue”.

![Image of the app screens showing the End a Visit option and the tasks page with options to select Yes, No, or Refused.](image-url)
3. You will see a confirm message appear. Press “Close” and then click on “Confirm”.

![Image of confirmation message]

![Image of task list with confirmed options]
NOTE: If a task was marked as “Refused”, you will be prompted to provide a Reason for the refusal. Make the selection and press “Continue”.

Reason Documentation

Choose a reason why Oral hygiene was not performed:

- Short Visit
- Another Day
- Pain
- Sick
- None
Visit Signatures

4. Two (2) signature requests are required to close the visit.

The first signature request is for the **Employee’s Signature**. Once you sign, select the “Save Caregiver Signature” button at the bottom.
5. After the caregiver/employee signs, the “Services Provided by Caregiver” will appear. The client should review the services. If satisfied, they need to press “TAP HERE TO SIGN”

![Services Provided by Caregiver]

6. The second and final signature request is to be the **Client's Signature**. Once they sign, select the “Save Patient Signature” button at the bottom.

![Signature Captured Successfully]
Other Information

View History

![History of Visits](image)

- **Employee:** You (508890)
- **Discipline:** 8Z
- **Client:** Wallace, Dolores
- **Episode:** PP
- **EVV:** No
- **Event Model:** false
- **Started:** 12/26/2017, 9:17:09 PM
- **Ended:** 12/26/2017, 9:17:55 PM
- **Duration:** 0 minutes 26 seconds 0 milliseconds
- **Offset:** -5
- **Status:** Ended

- **Employee:** You (508890)
- **Discipline:** 8Z
View Schedule

Scheduled Visits

- Client: Sharon Morrow
  - Start Date: Invalid Date
  - End Date: Invalid Date

- Client: Sharon Morrow
  - Start Date: Invalid Date
  - End Date: Invalid Date

- Client: Edith Dail
  - Start Date: Invalid Date
  - End Date: Invalid Date

- Client: Ina Feldman
  - Start Date: Invalid Date
  - End Date: Invalid Date

Tap the Date for Dec 27, 2017

View Schedule
Supported Devices

The Dial-N-Document Mobile Web App can be used with Android, iphone, ipad, and tablet devices, however there are certain system requirements for those devices. The following gives a general overview of the types of devices, and version level at which the app is at optimal functionality. Full lists of devices that fit this criteria can be found on the internet or by a specific search of the device and version.

Supported Devices and Requirements

Android

- Version 4.1 or above
- Device should be NFC capable if you are utilizing NFC tags to verify the attendance of the caregiver or using the employee access badges. NFC capability can be found by accessing Settings on the device. (Most devices prior to 2012 do not have NFC capability.)
- Chrome should be used as the browser. The DND Mobile Web App does not need to be launched directly from the browser. An icon for the app can be added to the device home screen or launched from Bookmarks.

iOS

- iphone 5 and above
- ipad 3 and above
- For full functionality including use of the Bluetooth verification and collection of client and caregiver signatures the iOS device should have version 8.3 or above. These two features do not function on devices with versions below 8.3.
- To use Bluetooth as a caregiver attendance verification, Bluetooth must be enabled in the phone settings.
- If not utilizing Bluetooth to verify attendance or collecting client or caregiver signatures iphone 4s or 4 and ipad2 can be utilized, but the user may experience delays during the selection process and Validator verification.
- Safari should be used as the browser. The DND Mobile Web App does not need to be launched directly from the browser. An icon for the app can be added to the device home screen or launched from Bookmarks.
Mobile Web Application
Memory and Data Usage Guidelines

Overview:
The Dial-N-Document® Mobile Web Application was designed so that it would not waste the Caregiver’s cell phone resources; however, it does require some system memory and mobile data usage to operate. This document will outline how these resources are used, and generally how the system usage will affect the amount of resources required. Note: 1GigaByte = 1GB = 1000MB

System Memory:

Base Memory:
- < 1MB - The amount of system memory the Mobile Web Application itself will use to operate.

Dynamic Memory:
The items below will be cleared when the user clears their cache, which will clear their History
- 0.006MB – System memory used for a complete visit (Start and End) with 20 tasks
- 0.12MB – Additional System memory used for a signature

Example:
At 40 Visits per Month (All visits available within the “History” page of the application)
- Documentation with both Client and Caregiver Signatures = 9.84MB used

Mobile Data:
- 1.4MB = The basic amount of Mobile Data required for a basic visit with signatures

Example:
At 40 Visits per month would use approximately 64MB of data.

Comparisons (according to recent surveys):
- Facebook: Scrolling through Facebook for 1 hour could use about 100MB of data.
- Facebook: Scrolling through Facebook for 1 hour could use about 5MB of data.

Summary:
Caregiver performs 40 visits (with 20 tasks per visit) per month
- Assuming a 1GB/month plan, the example above will use approximately 8% of their available data.
- If 1GB of Mobile Data costs $10/month, the cost would be approximately $1/month data usage.

Are You Aware:
Employees of Live Long Well Care get an 18% - 22% discount on Verizon Services and Accessories. If you need assistance, ask the HR Director for more information.
Trouble Shooting

Out of Service Area

If you in an area where you do not have mobile service or a wireless connection, you can still document your visit. In this situation, it is best to put your device into airplane mode so that it is not continually attempting to connect, which could cause issues. Once you have completed your log in/log out, starting or ending of the visit, you can take your device out of airplane mode.

Scheduled visit not appearing on device

If you believe that you have a visit that is scheduled, but not appearing on the device, there are a couple things you can do. First, make sure that you have an active mobile or wireless connection so that you are receiving updates. If you are out of a service area, the program cannot receive updates. If you do have a connection, tap the refresh button at the bottom of your screen. You can also log out and log back in to retrieve updates. If none of these things produce a schedule, contact your office/supervisor to report your issue.

Incomplete Visits

If a visit is not ended properly, or is still in progress, and Start Visit is selected for another the visit the message below will appear. If this has been selected in error, simply select Cancel to go back. If the visit is truly a visit that was not ended previously, then select OK. You will need to alert your Supervisor as to what occurred and follow your agency protocol for proper documentation.