myUnity

Guide to myUnity for Home Care

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**Instructions for LLWC MyUnity**

This tutorial is meant to assist you in learning how to navigate within MyUnity. 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 MyUnity Works.

**Training/Production Environment**

- To log in you will type in the URL address: https://visionsrlc.netsmartcloud.com
- The MyUnity login screen will appear, then click where it says “Login”, the screen that appears will present with two boxes (see A-1)
- In the box you will type in your user name: see below user roles and log-ins (see A-1a)
- Now tab to box below where you will type your password: see below user roles and log-ins (see A-1a)
- Now click on okay at the bottom of the box (see A-1a)

**User Roles and Log-ins**

Client Service Managers, Staff Coordinators and Nurses

- You will receive your log-ins and passwords for the training and production environment

**Training Assistance**

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Robin Johnston *(CSM of Cascades Verdae)*  
864-978-0103

Also, in MyUnity there is a Question mark in the upper right-hand corner. Please use in assistance with learning.
Home Screen/Desktop
Client Services Manager Role

Your home screen has different dashboards (widgets) that allows you to see in one screen what changes have occurred and what needs to be completed during our shift. (see example A-2 Home screen view)

A-2 Home Screen

To-Do’s Widget

Let’s first review each of our widgets.
- The first is our To Do’s Widget (open to a full screen by clicking on the little square box in the upper right-hand corner of the widget). See example A-3 To-Do’s Widget
- This is a communication tool to send me alerts.
- Allows us to see processes that have been started but not completed
- Now click back on the little square box in the upper right-hand corner and your will be back to your desktop view

**A-3 To-Do’s Widget**

The second widget we will use is called “recent changes” (see example A-4 recent changes widget)
This tool allows us to quickly see changes that have occurred over time, up to 7 days in the past.

You can open to full screen, again by clicking on the little square in the upper right-hand corner of the widget.

You can also configure what you wish to see on this tool by clicking on the little allen wrench, upper right-hand corner.

When you click on the allen wrench it allows you to decide (drop down box) how many days in arrears you want to see, then by clicking in the box in front of the items you wish to see (see example A-4a configuration of widget).

Once configured you click on okay and it will refresh widget, and present what you have asked to see.

Reduce widget back from full screen by clicking on that same square box in the upper right-hand corner of widget.

This is a great tool to see discharges from the SNF.

A-4 Recent changes widget
A-4a configuration of widget

Notice to the left of your widgets there is a column that lists your home screen widgets. This can also be used to quickly get to your different widgets and open them to full screen by clicking on widget you are working with (See example: A-5 open widget to full screen)
Inbox Widget

We want to check our inbox to make sure we don’t have any email messages from co-workers or others (See A-6 Inbox widget)

- Let’s open this widget by using the column to the left that I just spoke of in previous paragraph (click on-box).
- This widget is a HIPAA compliant message system that allows you to send and receive messages form co-workers, executives and physicians
A-6 Inbox Widget

The inbox allows for HIPAA compliant messaging and ability to attach a record to the message.

Census Widget

- Outpatient Census widget allows you to see census in real time
- The links are also active
- You can click on the number to the right of Census and it will run current census report
- You can hover over the admissions and discharges each month to see totals and click on bar for details (see A-7)

A-7 Census Widget
Favorites widget

- The favorites widget allows for one click access to anywhere in MyUnity
- You can create your own favorites by clicking on the wrench in the upper right-hand corner and a new box will open allowing you to create (see A-8)

A-8 Favorites widget

![Favorites widget image]

- One click access to anywhere within Vision
- Configuration wrench. This allows for adding favorites

Announcements Widget

- The announcements widget allows for announcements to be sent to all or specific roles
- You can click on the wrench in the upper right-hand corner and create your own announcement (see A-9)
A-9 Announcements widget

Collections Widget
- The collection widget allows you to see money owed
- You can configure by clicking on the wrench (see A-10)

A-10 collections Widget


Payments Widget

- The payments widget allows you to see deposits that have been made month-to-date
- And payments made the last 7 days
- By clicking on the links, you will be taken to the payments log for details of payments (see A-11)

A-11 Payments Widget

![Payments Widget Image]

- Deposits, month to date
- Who has paid in the last 7 days
- Configuration wrench

Admission

- Click on LLWC Admission in the Processes Widget (see A-15)
A-15 Go home/begin process

- A box will appear in the center, Enter the residents last name (see A-12)
- If they are already within our community their name will appear
- Highlight on the name and click ok

- Then highlight on create new admission, click OK
• The admission screen opens, on care setting use dropdown box to choose Homecare
• Use dropdown box under admission type and choose outpatient
• Choose location
• Hit save
- A new box appears in the center screen, please attach client to your LLWC location
- Click submit
• The process will open
• Notice to the left of your screen you will see the steps in the process to complete this admission
• When you are finished with each screen or step, click in the box to the right of the name of the step
• You will be taken to the next step in the process
• You can close out of the process at any time

• The process will remain in your To Do’s widget until you complete the process
• You can get back to the process, by clicking on the process in the To Do’s widget

• If they are outside of our campus, and does not already exist, after beginning process and searching, knowing resident doesn’t exist, click on Add Resident in the bottom of search box
• A new screen will appear
• Enter First and last name and Gender
• Under Organizational Structure, click on binoculars and highlight Corp at the top and click submit
• Then you will click add
• A new box will appear, click OK

• Now the Organization Selection will appear again, at this point choose your location and click on submit
• The process is now open and the steps are in the left-hand column
• Follow the steps in the process as stated above
• In the demographics screen, if current resident of community, there is no need to touch anything
• If outside of community, fill in the information asked on the screen
• When finished check the box to the right of the demographics step just completed and a green check mark will appear
• You are automatically moved to the next step
• Under Admission screen, don’t forget to choose Homecare and outpatient
• In box where admission number is, please enter a space and LLWC after the number

* Denotes required field

<table>
<thead>
<tr>
<th>Admission Number</th>
<th>19417 LLWC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Setting</td>
<td>Home Care</td>
</tr>
<tr>
<td>Admission Type</td>
<td>Outpatient</td>
</tr>
</tbody>
</table>

• Fill out referral information
• When finished click on save (make sure changes were saved)
  ○ You will get error if not filled out correctly or what is required
- Check off admission step
- Complete the contract, resident rights and Authorization for release of information steps
- Remember they can sign on the screen with mouse
- Under Billing step, please highlight on LLWC Private Pay in payer type box
- In plan box highlight on LLWC Private Pay

- Scroll down on page and where is says address/contact Override click the radial box for yes
- Enter name and address of person that will be receiving the bill
- Click submit at the bottom of the page
• Check off the completed step in the left-hand column
• In the next step of payer, enter date of admission
• Choose LLWC Private pay in the drop-down box to the right
• Click on submit

• Check that step off
• The next step is scheduling visits, you may be able to complete this step, but the step has been sent to Staff coordinator to check off
• See scheduling section for scheduling visits
• Close the process by clicking on close in the left-hand column below the steps
• For a referral process, follow the same steps as above, but instead of clicking on the admission process in Processes widget, click on LLWC referral
Care Plan Creation

Creating the care plan is what tells the caregiver what tasks need to be completed when they complete their visit in DND.

- In your favorites widgets, click on care plan creation
- A box will appear and ask for you to choose resident
- Enter resident last name and choices will appear
- Highlight on the correct resident and make sure you are on LLWC chart
- Then click OK
- You will be taken directly to the care plan add screen
- Click on add care plan
- Type Personal care in description box
- Then click on protocol link in the left-hand column
- **YOU MUST USE THE TASKS FROM THE LIST, IF YOU TYPE IN CUSTOM TASKS THEY WILL NOT FEED TO DIAL N DOCUMENT.**
- Click the + sign next to where is says personal care to open all the tasks
- Check the box to the left of each task the care giver should perform
- Click on the blue link in the left-hand column that says review
- Now click on the box in the lower right-hand column that says finish
- Your care plan has now been started
- You will notice in the screen you have problem – goal and interventions (tasks)
- In the box that says goal, to the right, click on add interventions (if you want to add tasks)
- A new box appears and you can enter the intervention in the box and click on search
- When your intervention appears, you check in the box to the left
- You can also type in % as a wild card and all tasks will appear
- In the bottom right-hand corner, you will click on save and close, unless you have more to choose, then click on save and new, continue until all are finished
- Remember to click on save in the upper left-hand corner
- Now let’s add frequencies and days that each task will need to be completed
- In the intervention box where the task is located, click in the box after the task and type days of week and times. See example
- Remember to save in the upper left-hand corner prior to closing out of the screen
G-1 select care plan

One click access to care plans. No need to get there the long way.
G-2 Select client to add/update care plan

Step 1: enter resident last name

Step 2: highlight on name

Step 3: click OK

G-3 Selecting client to add/update care plan

Step 1: highlight on proper chart or admission

Step 2: click on OK
G-4 add care plan

Click on add care plan

G-5 Creating care plan

Step 1: type in personal care

Step 2: click on Protocols
G-6 choosing task codes

Step 1: click on the plus
Step 2: click on plus
Step 3: check in the box to the left of each task you will be performing
Step 4: click on Review
Step 5: click on finish

G-7 open care plan to view mode

click on the plus to open care plan you just created
G-8 finishing care plan

Don't forget to save, you can add note to care plan
Add details such as frequencies, times and days of week
If you need to add more interventions. Remember if they are on the second page when building the care plan, you must add those interventions in this screen.

G-9 Adding more interventions

% is a wild card and will pull up all tasks. You can also type in task and click on search
When finish checking task/s click on save & new if you have more to add and save & close if finished adding new tasks
Check the box to the left of the tasks you need. You will see the tasks already in the care plan as they will be greyed out and say active to the right of the task
Print Care plan

- In the care plan screen you can click on the chain link in the upper right side
- Click on print care plan
- A new screen will open
- The resident should already be chosen and you just click on submit
- Now you can print care plan

H-1 printing care plan
H-2 Printing care plan

last step after set up below is to click on submit to run care plan

Active

make sure running in PDF

enter effective date

Resident should already be chosen, but if not type in last name and click on binoculars

H-3 care plan report

Scheduling/Staff Coordinators

Home View
Scheduling Services/Visits

- When scheduling visits for a client
- Click on Find Resident in the upper right of screen
- A box will open (see B-5)
- Type in resident last name and hit enter on the name of resident (see B-6)
- Now click on the proper LLWC admission (see B-7)
- In the resident ribbon on the upper left-hand side, click on the calendar (see B-8)
B-5 selecting Resident

- Highlight on proper admission, then click OK.

B-6 Selecting a Resident

- Type in client's last name and hit enter or click on magnifying glass.
- Highlight on client's name and hit enter or click OK below.
B-7 Selecting a Resident

• Double click on calendar for the date and time the first visit is to start (see B-9)
• The request screen will open, and it already has time and start date, you can change in this screen if needed (see B-10)
• Click on drop down box for Service type, you will have a choice of LLWC private duty Aides or LLWC private duty nurse. Choose one of the types
• In the box to the right choose the service you will be providing
• If you will be scheduling more than one visit or a recurrence, click on the binocular to the right of recurrence (see B-10)

B-8 Resident Calendar
• A box will open and allow you to set the occurrence daily, weekly or monthly or yearly and decide if it is open ended (no end date) or if it ends after so many times or after a certain date. (see B-11)
• When finished choosing recurrence, click on OK and the box will close and recurrence is set (see B-11)
• Notice under time/duration it will default to a time, but you can change using the drop-down box, you can change to hours or minutes and change the amount in the box (see B-10)
• You are now ready to choose the caregiver. Remember, if you do not want to schedule a caregiver at this time, you can simply click on save in the upper left-hand column, and schedule later from the whiteboard. (see B-12)
• To choose a caregiver, click on the blue link “skill:caregiver” (see B-12)
• A new box will open and allow you to set parameters and then click on apply filters (see B-13)
• A list of available caregivers will appear (see B-14)
• Click on the caregiver you would like to assign, and the box will close and assign the caregiver (see B-14)
• Hit the save button in upper left-hand corner. (see B-15)
• A screen will appear showing visits are confirmed (see B-16)
• Close out with the red X in the upper right- hand corner, then red X out of calendar. You should be back at your home screen.
• You should be back at your home screen.
**B-11 Creating Recurrence**

**B-12 Selecting Caregiver**

Click on caregiver for assignment. If you want to schedule but not assign to a caregiver at this time, just hit save at the top without picking a caregiver.
B-13 Selecting caregiver

B-14 Choosing caregiver

Click on employee you want to assign
B-15 Save

Back at your home screen click on Whiteboard in favorites widget (see B-17)

Click on “open resource whiteboard” (see B-18)

Take a minute to review the whiteboard (see B-20)

The scheduled visit in brown in the upper box and not assigned to a care giver

You can simply hover over the box and another box will open and show who has been previously assigned and where they are in their work week as far as hours

You can click on assign to the caregiver to the right of the box

B-16 show confirmed visits

After hitting save, this screen appears and lets you know that all visits have been confirmed. If the caregiver wasn’t available for any of the times, it would show those as still unassigned.

Whiteboard
• You can also drag the visit from the top to any caregiver and let go.
• Notice to the left all the employees are listed
• You can open their row by clicking on the + to the left of the employees name
• You can open all employees at once by clicking on the + to the left of where it says expand all
• Not the links under each employee
• These are quick links to get to other areas for adding new visits, updates or changes without leaving the whiteboard
• When finished with close out of calendar by clicking on X in upper right-hand corner and then click on red x in upper right-hand corner and you should be back at your home screen.

B-17 Whiteboard
B-18 Resource Whiteboard

B-20 Whiteboard

Reports

- Employee Calendar and Visit Report are two reports that will be used most often
- Back on home screen click on Employee Calendar in your favorites widget (see C-1)
- Complete set up of report as shown in C-1a, then hit submit
• See C-1b for an example of report.

C-1 Print Employee Calendar

C-1a Print employee calendar

Choose employee

Enter date range

What visits are you wanting to appear on the calendar

When finished choosing selections for report hit submit
Visit Report

- Click on Visit report from favorites widget.
- Pick organization structure
- Make sure running in PDF
- Under visit status click in box to the left of confirmed
- Under personnel selection choose employee by typing last name in box and click on binoculars
- Personnel will appear in box
- Double click on personnel name or click on arrow to place them in box to the right
- Click submit
C-2 Visit Report

![Screen Shot of C-2 Visit Report]

- **Organizational Selection**
  - Homestead Hills LLC/All

- **Service Type(s) to Include**
  - HCSC, Monthly Visit
  - LHC, Medical
  - LHC, Non-Medical

- **Service(s) to Include - Service Name (Service ID)**
  - Juanita Brown (HSC021)

- **Personal Selection**
  - Include: Applicant, Ada

- **Format Processing Options**
  - Page

- **Data Filter(s)**
  - Effective Date Range: From 01/01/2019 to 01/14/2019

- **Select for**
  - Completed
  - Unassigned

- **Page(s) to Include - Page Name (Page ID)**
  - Patient Information
  - Resident/Patient
C-2A Visit Report Example

Personnel

Adding or making changes

- From the home screen click on the Personnel tab
- Notice the different tabs across personnel
- Enter a last name and hit apply filters
- If your employee is already in the system, their name will appear
- Click on their name and you will be in their record
- If they do not exist and you want to add a new employee
- Click on add new upper left side with a green +
- To the right of the Personnel ID, in the box type in their Palocity employee number
- Enter information requested, if a nurse, in the title box enter RN or LPN (this will be added to electronic signature)
- You must enter employment status
- Click yes for internal staff
- Hit save, then click on red x
- Click on contact information tab and complete
- Click on employment History tab
- Click on the start date under date and a new box will open
- Click on the pay rate and add pay
  - If they are agency please add .01
- Click on the tab Skills/licenses
- Discipline must say Personal care
- Add skills, and licensure/ certifications
- Hit save
- Click on work schedule, click on base calendar and set calendar up for scheduling
- Click on schd attributes and add any attributes or exceptions
- When finished go back home
choose pay cycle

click on personnel type

choose home organization

everyone should have discipline of Personal Care. This is what sends to Dial N Document

Click on base calendar

choose from drop down box
Initial Assess/Re-assess Visits
When an assessment or re-assessment visit has been created, the Manager or nurse responsible will complete that visit within MyUnity.

- From your home screen (see E-1)
- Find Resident (see E-1)
- Click on clinical tab (see E-1)
- Click on visit note tab (see E-1)
- Click on scheduled visit on calendar to begin visit (see E-1)
- Follow and complete each step of the visit (see E-2)
- End visit (see E-4)

**E-1 completed initial visit**

![Image of E-1 completed initial visit]

**E-2 visit started**

![Image of E-2 visit started]
E-3 complete each step

You will want to approve visits daily from the day before. This is sent to Pat for billing and payroll.

Visit Editor

- In your Favorites widget, click on Visit Editor (see F-1)
- Set date
- Apply filters
- Review all visits for completion and accuracy
- Make any edits or changes necessary
- Hit save when all edits and changes are complete and you are satisfied that everything is correct
- Click on the chain link in the upper right-hand corner (see F-1)
- Click on generate batch

E-4 end visit
• Set date, check box for both for Visit types to include (see F-2)
• Click on Submit
• Batch generate (see F-3)
• Visit charge generation will appear (see F-4) close out of window and you can complete and can return to home screen

F-1 Visit Editor

Choose dates
Apply filters

last step after save, is click on chain link and click on create batch
Review for accuracy, make any necessary changes
F-2 Generate Visit Charges

1. Enter dates
2. Choose both
3. Click submit

F-3 batch generated

This is the charge batch created. Pat will approve and complete billing and payroll.
Adding administrative time, training, mileage, etc.

After your batches are completed you can go in and add non-billable labor hours and mileage

- Click on financial tab
- Click on charges (legacy)
- Under batch list, click on batch you are going to work with
- Under template list click on LLWC
- Click on update batch
- The batch will open
- Go to the last page
- Enter time in
- Hours spent
- Click on ? for item ID to enter service to pay for
- A new box will open
• Choose non-billable labor from the drop-down box
• Click on search and choose what you are paying for
• Enter date for time out
• Enter employee name under personnel and click on binoculars
• Click on submit
• Now you can close, and you are finished

[Image of Add/Update Charges page]

- Make sure org is set
- Choose batch
- Pick LLWC template
- Last step, click on update batch
Daily Tasks

- Visits should be approved and a batch created for the previous day
- Please refer to Visit editor section for directions

Weekly Tasks

- Ensure there are not any visits that have not be batched
- You will need to run your action for continuous schedules to continue

G-1 Running Recurring Schedules

1. Click on Scheduling tab
2. Click on Actions
3. Click on Generate open-ended recurring requests

Don’t forget to save, by clicking on submit
When finished click on Close
Enter employee
G-2 Recurring requests

G-3 continuous schedules that were just continued

G-4 What was created
**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

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 MyUnity.
1. To start a visit with a client, simply click on “Start a Visit”.

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

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.
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”.

3. You will see a confirm message appear. Press “Close” and then click on “Confirm”.
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”.
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”

<table>
<thead>
<tr>
<th>Services Provided by Caregiver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee: You (508890)</td>
</tr>
<tr>
<td>Discipline: Personal Care Worker</td>
</tr>
<tr>
<td>Client: Feldman, Ina</td>
</tr>
<tr>
<td>Episode: PP</td>
</tr>
<tr>
<td>EVV: No</td>
</tr>
<tr>
<td>Event Model: false</td>
</tr>
<tr>
<td>Answered: 1/15/2018, 1:38:54 PM</td>
</tr>
<tr>
<td>Started: 1/15/2018, 1:38:53 PM</td>
</tr>
<tr>
<td>Ended: 1/15/2018, 1:39:11 PM</td>
</tr>
<tr>
<td>Disconnected: 1/15/2018, 1:43:17 PM</td>
</tr>
<tr>
<td>Duration: 0 minutes 18 seconds 0 milliseconds</td>
</tr>
<tr>
<td>Offset: -5</td>
</tr>
<tr>
<td>Status: Ended</td>
</tr>
</tbody>
</table>

Documentation:
- Narrative:
  - Travel Time: n/a
  - Shower = Yes
  - Oral hygiene = Refused (Another Day)

Signatures:

Client Signature: GIVE PHONE TO CLIENT FOR REVIEW AND INSTRUCT THEM TO TAP HERE TO SIGN

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.
Other Information

View History

![View History Image]

**History of Visits**

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, 9:17:35 PM
Duration: 0 minutes 26 seconds 0 milliseconds
Offset: -5
Status: Ended

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

Tap the Date for Dec 27, 2017

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