

Website Review Notes

11.16.2022 Part 2

Community Portal

2.

1. Budgeted Agency Shifts : \$40

Actual Agency Shifts : \$4

Budgeted Agency Spend : \$40,000

Actual Agency Spend : \$894

Start Filter : mm/dd/yyyy HH:MM

End Filter : mm/dd/yyyy HH:MM

Search Search ---Select Shift Type---

+ Add Shift

View Calendar

Refresh

View In Card

COMMUNITY NAME

POSITION

DESCRIPTION

DELAY

START DATE

START TIME

END DATE

END TIME

STATUS

ACTIONS

1. Budgeted Shifts and Actual Shifts are the # of shifts. These are not a \$ amount. Remove the dollar sign.
2. Where are the 40 Shifts and \$40,000 Budgets come from??

IF you look at Agency Budget for RoseWood Village Greenbrier – there is no budget for 40 and \$40,000 entered...

Done

bloomtrak

Dashboard

Agency

User

Shifts

Reports

Agency Workers

Department

Certification

Position

Agency Holiday

Agency Budget

Agency Rates

Community Portal

Add Budget List

+ Add Budget

YEAR	MONTHS	AGENCY'S SHIFTS	AGENCY SPEND	ACTIONS
2022	12 - December	60	\$38,400	
2022	10 - October	120	\$64,000	
2024	05 - May	123	\$12	
2023	01 - January	50	\$10,000	
2025	02 - February	asd	\$1,000	
2023	04 - April	22sd	\$44,800	
6 total				

Reports - Agency Time Detail

DATE

CURRENT

Start Date

2022-11-01

Export to Excel

End Date

2022-11-09

Export to PDF

Toatl Days

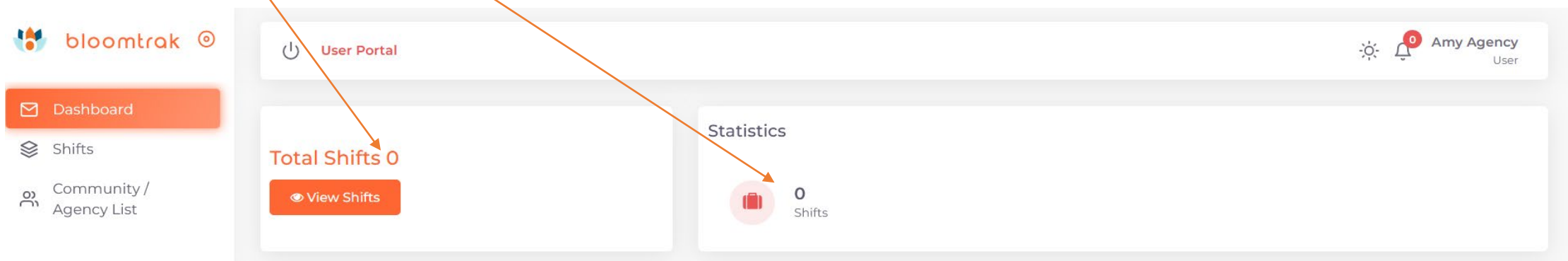
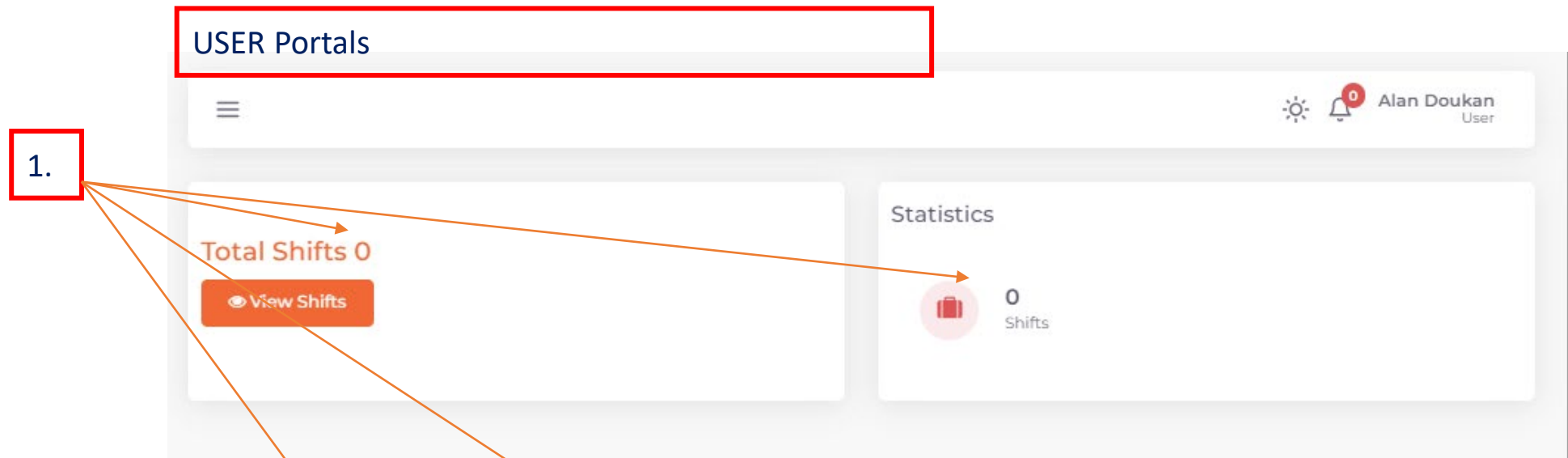
8

1.

1.

Shift Count	Agency Name	Agency Employee	Date	Position	Scheduled Start Time	Scheduled End Time	Total Hours	Clock In Time	Variance Clock In Time Complete	Variance Clock In Time	Adj Clock In Time	Clock Out Time	Variance Clock Out Time Complete	Variance Clock Out Time	Adj Clock Out Time	Gross Hours
1	Agency Shareef	Amy Agency	2022-10-31	Direct Care Aide	11:00 am	07:00 pm	0	0	Y	11:30 am	11:30 am	0	Y	08:00 pm	08:00 pm	0
2	Agency Shareef	Amy Agency	2022-11-02	Direct Care Aide	12:00 pm	04:00 pm	0	0	Y	05:00 pm	05:00 pm	0	Y	01:00 am	01:00 am	0
3	Agency Shareef	Amy Agency	2022-11-02	Direct Care Aide	07:00 pm	10:00 pm	0	0	Y	07:00 pm	07:00 pm	0	Y	02:00 am	02:00 am	0
Total							0									

1. Total Hours, Gross Hours showing 0 but should be calculated.
2. I cannot find these shifts in the list of Shifts. Can we please review this?



1. USER Dashboard does not have any data filling in.

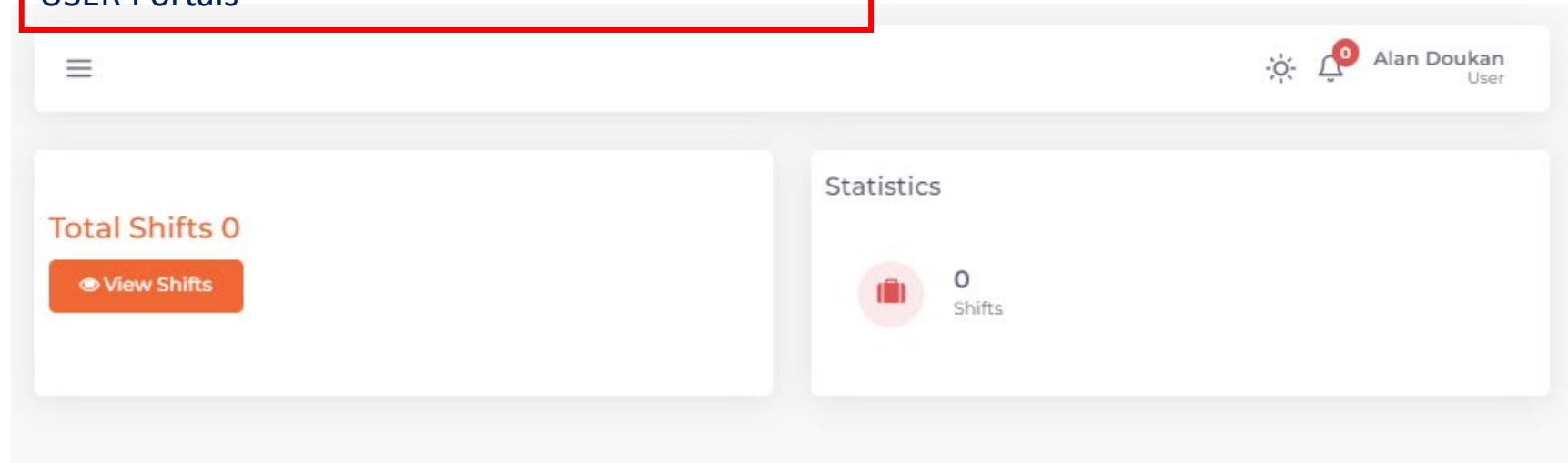
Are “Shifts” the shifts that have been assigned to the user or are “Shifts” the number of Shifts they have applied for? Does it including shifts they have worked in the past?

Can we finalize the Dashboard to have some meaningful information for users?

Done

USER Portals

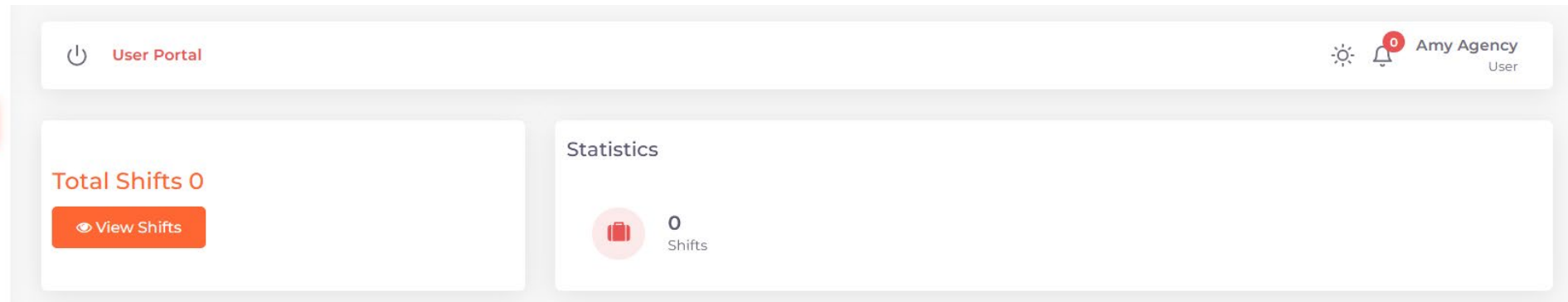
1.



Dashboard

Shifts

Community /
Agency List

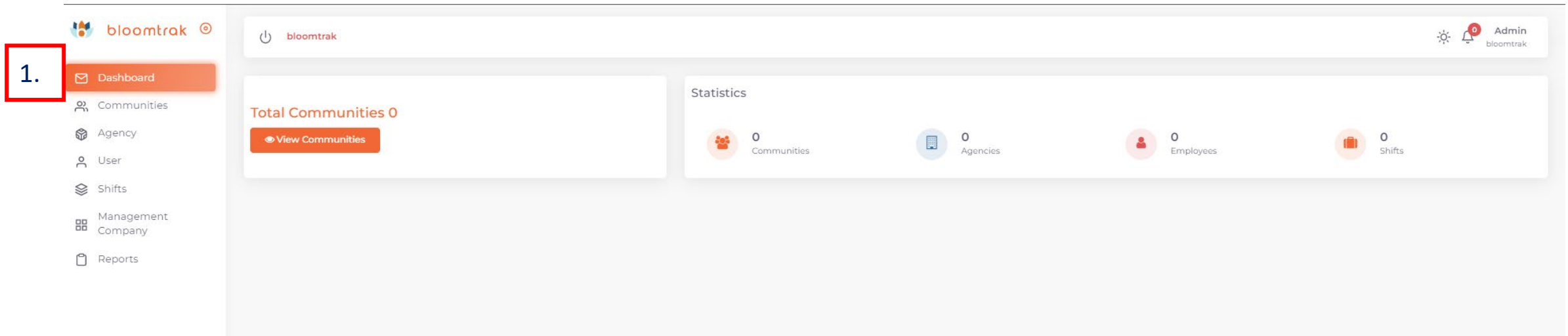


1. How does a user see the shifts they have worked? How can they see what their clock in and clock out times are? How can they see the adjusted clock in/clockout time?

Anyone who works would want to be able to see the time they are being paid for.

Done

Admin Portal



1. Dashboard statistics not calculating.
 - a. Total Communities, Agencies, Employees & Shifts are not totaling
 - b. See Slide #3 for questions about what Shifts means here.

Done

Agency Portal

Agency Shareef
Agency

Reports
Home

Reports

1.

Agency Detail Time Report

Custom

11/01/2022

11/17/2022

Cancel

Generate Report

---Select Agency---

DATE

CURRENT

Start Date

2022-11-01

Export to Excel

End Date

2022-11-17

Export to PDF

Toatl Days

16

Shift Count	Agency Name	Agency Employee	Date	Position	Scheduled Start Time	Scheduled End Time	Total Hours	Clock In Time	Variance Clock In Time Complete	Variance Clock In Time	Adj Clock In Time	Clock Out Time	Variance Clock Out Time
Total							0						

- For Agency Reporting – we should talk about which reports they can see. And whether or not Agency Reporting should be available for Agencies or if this is one area that should be free for a certain number of reports and then must be paid for. Or can be free for 30 days and then must be paid for etc.

For the time being, Agencies should only have access to the Agency Detail Time Report and their report should be for all Communities and they can have the option to “Select Community”.

If we must choose one option – I would recommend they get the report for All Communities they have worked for for that period of time and they can sort the data once it is in Excel.

Admin Portal

Dashboard

Communities

Agency

User

Shifts

Management Company

Reports

Home > Agency

Add Agency

Agency Name *

Agency Phone No *

Agency Email Address

Community List *

Agency Address *

Agency City *

Agency State *

Agency Name

Agency Phone No

Agency Email Address

Anthology of Charlottesville

1.

Address 1

Address 2

City

State...

Agency

Home > Agency > Agency Shareef

Basic Information

Agency Password

Agency

Agency Name *

Agency Phone No *

Agency Email Address

Agency Website *

Agency Address *

Agency State *

Agency City *

Agency Zip Code *

Show The Shift To User *

Agency Contact First Name *

Agency Contact Last Name *

Agency Contact Person Title *

Agency Contact Cell Number *

Agency Contact Email Address *

Save

Cancel

1. I am unable to select more than one Community for an Agency. Agencies can work for numerous communities.

How can this be accomplished?

When Editing and Agency in the Admin Portal – I cannot add any Communities the Agency.

Done

AGENCY Portal



- Dashboard
- Agency Personnel
- Shifts
- Reports

1.

Agency Rates

Agency Portal

Agency Rates List

Search

AGENCY NAME	POSITION	T 7A 3P WDN	T 3P 11P WDN	T 11P 7A WDN	T 7A 7P WDN	T 7P 7A WDN	T 7A 3P WEN	T 3P 11P WEN
Agency Shareef	Direct Care Aide	\$ 30	\$ 32	\$ 32	\$ 30	\$ 32	\$ 30	\$ 32
Agency Shareef	Shift Supervisor	\$ 65	\$ 67	\$ 69	\$ 65	\$ 69	\$ 70	\$ 72
Agency Shareef	Registered Medication Aide	\$ 40	\$ 42	\$ 44	\$ 40	\$ 44	\$ 40	\$ 42

3 total

1. I do not understand Agency Rates in the Agency Portal. It is possible that an Agency would want to input their rates into the portal but an Agency may have different rates for each Community they work with so they would need to be able to input Agency Rates by community. Does not function properly at set up.

If this is connected somehow the Agency Rates in the Community Table – this needs to be changed. The Agency should not be able to edit their rates.

2.

RoseWood Village Greenbrier Community Portal

Agency Rates List

[+ Add Agency Rates](#) [Import File](#)

Search

AGENCY NAME	POSITION	T 7A 3P WDN	T 3P 11P WDN	T 11P 7A WDN	T 7A 7P WDN	T 7P 7A WDN	T
Agency Shareef	Shift Supervisor	\$ 65	\$ 67	\$ 69	\$ 65	\$ 69	\$
Agency Shareef	Registered Medication Aide	\$ 40	\$ 42	\$ 44	\$ 40	\$ 44	\$
Brian Agency	Direct Care Aide	\$ 50	\$ 15	\$ 50	\$ 50	\$ 50	\$
Richmond Agency	Direct Care Aide	\$ 10	\$ 60	\$ 60	\$ 60	\$ 60	\$

4 total

2. I Edited the Direct Care Aide rate and it was deleted from the RoseWood Village Greenbrier Agency Rates table....The connect here is an issue. There is now no Direct Care Aide rates for Agency Shareef under RoseWood Village Greenbrier.

All Portals

1. Agency Shift Variance Form attached separately

[Clear Form](#)

bloomtrak - Agency Shift Variance Form Version 1 Form 1 of 2 to be completed

Community Information

Community Name Telephone
Address City State Zip

Agency Employee Information

Last Name First Name Phone Number

Agency Name/Information

Agency Name Phone Number

Variance Request

	YES
1. Requested by approved Community Personnel to start the shift prior to the scheduled start time:	<input type="checkbox"/>
2. Requested by approved Community Personnel to remain at the community after the scheduled end time:	<input type="checkbox"/>
3. Specifically instructed by approved Community Personnel not to take a meal break during a shift that is 6 or more hours long:	<input type="checkbox"/>
4. Timecard correction due to clock-in or clock-out malfunction:	<input type="checkbox"/>

A. Requested by approved Community Personnel to start the shift prior to the scheduled start time:

1. Who was the approved Community Personnel that requested you to clock-in early? _____

2. What specific tasks were you asked to complete? _____

In order for your time to be paid, the Community Personnel who made the request must complete and sign this section of the form:

1. Please describe the circumstances that led to your request for the Agency team member to clock-in early? Be specific as this information must be substantiated prior to approval of the form.

2. Please explain why this could not have been done once during the scheduled shift:

Community Team Member Name Phone Number Signature Date

B. Requested by approved Community Personnel to remain at the community after the scheduled end time:

1. Who requested that you to stay after the end of the scheduled shift? _____

2. What specific tasks were you asked to complete? _____

In order for your time to be paid, the Community Personnel who made the request must complete and sign this section of the form:

1. Please describe the circumstances that led to your request for the Agency team member to clock-in early? Be specific as this information must be substantiated prior to approval of the form.

2. Please explain why this could not have been done once during the scheduled shift:

Community Team Member Name Phone Number Signature Date

Version 1 Form 2 of 2 to be completed

C. Specifically instructed not to take a meal break during a shift of 6-hours or more:

1. I understand that being busy is not a reason to not take a meal break? YES ☐ NO ☐

2. Who communicated to you that you were NOT to take a meal break during your shift of 6 hours or more? _____

In order for your time to be paid, the Community Personnel who made the request must complete and sign this section of the form:

1. Please describe the circumstances at the community that resulted in you communicating to an Agency employee that he/she was not to take a meal break during a shift of 6 or more hours:

2. Please explain why time could not have been made for the break at a different time during the shift?

Community Team Member Name Phone Number Signature Date

D. Time Card Correction

1. Clocking In: The bloomtrak site was not functioning properly when I was trying to clock in.
a. My Clock In time should be: _____

2. Clocking In: The bloomtrak site was not functioning properly when I was trying to clock in.
a. My Clock Out time should be: _____

It is strongly recommended that you take a picture of the error on your cell phone at the time you are clocking in our out for documentation and troubleshooting purposes.

3. I was unable to Clock In as a result of another Agency employee being assigned to the shift I was scheduled for.
a. I contacted my Agency and requested the change to be made in bloomtrak a phone call: YES ☐ NO ☐

b. The person I spoke with or left a message with is: _____

In order for your time to be paid, the Community Personnel who made the request must complete and sign this section of the form:

1. I am aware that the bloomtrak timeclock site was not functioning properly at the time the Agency Employee was attempting to clock in or clock out and the above information is accurate:

2. Please describe when you were informed of the issue with the site:

Community Team Member Name Phone Number Signature Date

1. We need a "Forms" tool bar somewhere. Currently, we would need/want the Agency Shift Variance Form posted so that it is downloadable by anyone needing it.

Has the Agency Shift Variance Form been uploaded to the site so it can be easily downloaded by Agency Users or the Community?

Notifications

Still needs significant
formatting

- Shift times in both email notifications and text notifications are still off by 3 hours. In bloomtrak this shift was for 7am to 3pm. Not 4am to 12 pm.

Also, is it possible to include the am/pm in the email notification?
- Look at the text in the Text Notifications. "Community RoseWood Village Greenbrier Community RoseWood Village Greenbrier a Shift please see details a Shift please see details" THIS IS NOT what we have requested the language to be.

bloomtrak New Shift

RoseWood Village Greenbrier add a shift please see details

Community Name : **RoseWood Village Greenbrier**
 Position : **Direct Care Aide**
 Start Time : **11/19/2022 4:00**
 End Time : **11/19/2022 12:00**

To Apply for this shift [Click here](#)
 Thank you!

BLOOMTRAK TEAM
 Automated message, please do not reply.

1.

Community RoseWood Village
 Greenbrier Community RoseWood
 Village Greenbrier a Shift please see
 details a Shift please see details
 Position: Direct Care Aide
 Start Time: 11/19/2022 4:00
 End Time: 11/19/2022 12:00

<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>RoseWood Village Greenbrier Community Portal</div>									
Shift List View In Card									
Budgeted Agency Shifts : \$40		Budgeted Agency Spend : \$40,000		Start Filter :		mm/dd/yyyy		HH:MM	
Actual Agency Shifts : \$4		Actual Agency Spend : \$894		End Filter :		mm/dd/yy		HH:MM	
+ Add Shift		View Calendar		Refresh		Search		---Select Shift Type---	
COMMUNITY NAME	POSITION	DESCRIPTION	DELAY	START DATE	START TIME	END DATE	END TIME	STATUS	ACTIONS
RoseWood Village Greenbrier	Direct Care Aide	This is test description	30 Minutes	11-26-2022	11:00 am	11-26-2022	05:30 pm	Filled By Agency	
RoseWood Village Greenbrier	Cook	This is test	30 Minutes	11-25-2022	08:00 am	11-25-2022	05:30 pm	Filled By Agency	
RoseWood Village Greenbrier	Direct Care Aide	bolah	00 Hours	11-19-2022	07:00 am	11-19-2022	03:00 pm	Filled By Agency	

Notifications

Slides taken from
10.17.20 Review Notes

Agency Personnel: Amy Agency

12:43 🌙

< 64

+1 (606) 595-5861 >

Agency Shareef has applied on your behalf for the following shift:

Community:RoseWood Village Greenbrier
Position:Direct Care Aide
Start:12:00 am
End:12:00 am

Hey Amy Agency Community RoseWood Village Greenbrier is assigned shift forDirect Care Aide

Unfortunately your shift been canceled. Contact your Agency if you have any questions.

Community:RoseWood Village Greenbrier
Position:Direct Care Aide
Start:10/21/2022 12:00 am
End:10/21/2022 1:00 am

Community, Position, Start/End all should be left justified.

Start and End do not include the date.

Amy Agency, you have been assigned by [Agency Name] to:
Community:
Position:
Start:
End:

Position, Start and End should all be left justified.

Community seems correct.

Can we shorten date year to 2 digits?

1. See notes

CAN WE ADD A URL in text messages so they can easily get to bloomtrak?

Done

Community User: Alan Doukan

Community RoseWood Village
Greenbrier Community RoseWood
Village Greenbrier a Shift please see
details a Shift please see details
Position: Direct Care Aide
Start Time: 10/21/2022 1:00
End Time: 10/21/2022 2:00

2.

Community RoseWood Village
Greenbrier Added a Shift please see
details
Department: Health
and Wellness
Position: Direct Care

[Community Name] has added an
open shift:
Position: Activities Assistant
Start: 10/05/22 11:00 am
End: 10/05/22 1:00 pm

No need for word
"Community"

2.

Community RoseWood Village
Greenbrier A shift has recently been
reopened.
RoseWood Village
Greenbrier a Shift please see details
a Shift please see details
Position: Direct Care Aide
Start Time: 10/21/2022 12:00
End Time: 10/21/2022 1:00

Community RoseWood Village
Greenbrier Re Open a Shift please
see details
Department: Health
and Wellness
Position: Direct Care
Aide
Start Time:
10/04/2022 10:00
End Time:

Alan Doukan

A shift has recently been reopened.
Community: [Community Name]
Position: Direct Care Aide
Start: 10/04/22 10:00 am
End: 10/04/22 11:00 pm

Thank you Alan Doukan for applying
the following shift:
RoseWood Village
Greenbrier
Position: RoseWood Village
Greenbrier
Date: 10/21/2022
Start 12:00

[User Name], thank you for applying for the
following shift:
Community: [Community Name]
Position: [Position]
Start: 10/04/22 11:00 am
End: 10/04/22 4:00 pm

Use line breaks
between lines to
ensure proper spacing
and left justification.

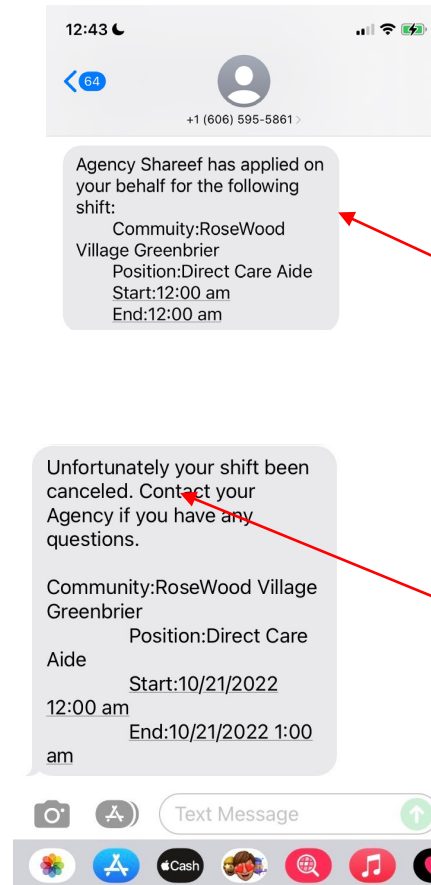
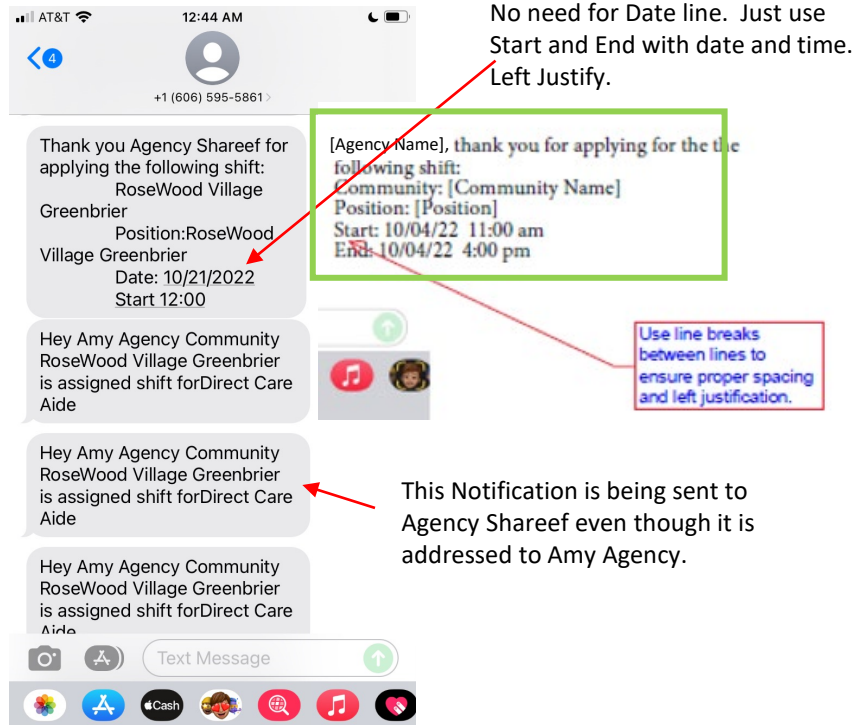
1. See old note. Simplify communication.
2. See old note. Simplify communication. Change "Start Time:" to "Start:" and "End Time:" to "End:"
3. See old note.

GENERAL COMMENT

Would be great if dates were
MM/DD/YY

Changing YYYY to YY saves space.

Agency: Agency Shareef



This Notification is being sent to Agency Shareef even though it is stating “has applied on your behalf” as if it should be going to Amy Agency.

This language is for a cancelation notice sent to the Agency Personnel Assigned to the shift.

The Agency should not receive a message that states “Contact your Agency if you have any questions.” Delete that language but only for a message going to Agency.

That language should remain for the Agency User.

1. See notes.