Safety Notice

Service Provider
Web Administration User Guide

Updated July 1, 2015

Table of Contents

This document is intended to give service providers a solid overview of the Safety Notice system. The document covers work flow from the "top of the page to the bottom of the page." Furthermore, it follows a **HEADER**, **FUNCTION**, **Sub Function** format.

EMPLOYEES

REACH OUT: This function's purpose is to help immediately staff an existing or prospective client. The function simultaneously sends a text message to all employees that meet two criteria 1) Distance from the client's address and 2) possesses a certain type of designation (ex. RN, CNA, etc.).

Step 1: Enter the address of the client's location to be staffed

Step 2: Select the employee's distance from the address (The default is 10 miles. This can be raised or lowered to expand or reduce the area searched.)

Step 3: Choose the designation of the employee desired (Designations can be modified at: EMPLOYEES – DESIGNATIONS)

Step 4: Click "Search" – The employees meeting your criteria, WHO ARE LOGGED IN TO THE MOBILE APP, will appear in the area on the right. If no employees match your criteria, you will be notified in the same area and asked to modify the distance or employee designation(s) chosen.

Step 5: Type the message you wish to convey to the recipient employees and click "Send Message."

Message Archives: This sub function chronicles the messages sent using the REACH OUT function.

The columns represent:

Date/Time: This shows the date and time the message was sent.

Message: The message is truncated to appear on one line. To view the entire message, simply click on the message. The entire message will appear in a dialogue box.

Employees: The number of employees who received the message is displayed. To see the actual recipients, click on the number. The recipients will appear in a dialogue box.

Action: This enables you to delete the message from the Message Archives' list.

DESIGNATIONS: This function serves to set up the designations that can be assigned to any employee. The system will allow up to 10 designations. Four designations are set up as default designations. They are CNA, LPN, RN and Other. They can be deleted and/or modified.

Add New Designation (column on left):

Step 1: Type in the name of the designation

Step 2: Select a color for the designation from the drop down list (This color will be displayed on all employee tracking maps) and click "Add New Designation." The new designation and corresponding color will appear on the right under the "Designations List" column.

If a color is selected that is already in use (see Designations List on right column), the resulting dialogue box will provide a prompt to select a different color.

Designations List (column on right):

To change a designation, simply click "Edit." The Edit Designation sub function will appear. Next, change the Name, Color or both and click "Update Designation."

To delete a designation, click "Delete." A prompt will appear requiring confirmation of the deletion before the system purges the designation.

NEW EMPLOYEE: Here is where new employees are added. A list of the data fields is referenced below. Fields with unique functionality and/or logic are addressed.

First Name:

Last Name

Address: This field is key to displaying an employee on the map using the TRACK - EMPLOYEE BASE LOCATION function. It also serves for mapping purposes on the TRACK - EMPLOYEE TRAVEL HISTORY function.

State:

County:

City:

Zip:

Username: This field is required for an employee to have access to the mobile app.

Password: This field is also required for an employee to have access to the mobile app.

Designation: This field assigns a designation to the employee. It has involvement with the EMPLOYEES – REACH OUT and the TRACK – EMPLOYEE EXISTING LOCATION functions.

Phone Number: The number in this field should be associated with a smartphone that is capable of receiving text messages. It is essential for the EMPLOYEES – REACH OUT function.

EDIT: This function enables the service provider's administrator to modify an employee's information in the database. Once any changes are made in the fields, the "Update Employee" button must be clicked for the changes to become effective.

Another way to access the Edit function is to click on the employee's name in the leftmost column. It is a hot link to the employee's information page.

DELETE: This button is used to remove an employee from the database. Once clicked, a prompt will appear requiring confirmation of the deletion. <u>ONCE AN EMPLOYEE IS DELETED, THE SAFETY NOTICE SYSTEM CAN NO LONGER REPORT ON THE EMPLOYEE'S HISTORICAL ACTIVITIES.</u>

COLUMNS DISPLAYED ON THE MAIN EMPLOYEES' PAGE:

Name: Employee names are displayed in alphabetical order

User Name: This is the name assigned to the employee for access to the mobile app

Designation: This is the professional designation assigned to the employee

Active Loved One: When an employee is involved in an encounter with a loved one, the loved one's name will appear here in real time.   To the right of the loved one's name the date and time the encounter began is displayed.

Location: This is the address where the employee and loved one encounter is transpiring.

LOVED ONES

FOLLOWERS: This function is one of two ways to add followers (family members and/or friends of the loved one) to the Safety Notice notification system. When a follower is added to the system, they receive message each time an employee begins and ends and encounter with a loved one.

Loved One Follower

Step 1: Select the loved to be linked to the new follower and click “Add Follower.”

Step 2: Enter the follower’s first name and last name in the labeled fields.

Step 3: Select the contact method where the follower wants notifications sent. The selections are Email and Text. Once the box (or boxes) is checked, the corresponding field below will become active. Once active, enter the appropriate information and then click “Create Follower.”

SEND ADMIN MESSAGE: This function was established to overcome communication issues associated with an employee who does not have a smartphone. More specifically, it is used to administratively send messages to a love one's family members and followers when an employee is interacting with their loved one.

Loved Ones

From the left column labeled "Loved Ones," perform the following:

Step 1: Select the employee from the drop down who is interacting with the loved one

Step 2: Select the loved one who is subject of the encounter. The "Search" button works by first name or last name. When the loved one is visible, click the "Select" button. A dialogue box will appear confirming the request to make the love one become "Active" in the system. Once active status is achieved, the loved one's name will appear in the column on the right labeled "Active Loved Ones."

Active Loved Ones

This sub function has three columns and three buttons. The columns will show the loved one's name, date of birth and the employee who is involved in the encounter with the loved one.

The three buttons are: Arrival (Pick Up for a Transportation provider), Departure (Drop Off for a Transportation provider and Remove.

Once the employee has indicated the encounter with the loved one has begun, click "Arrival." It will immediately generate a notification to the loved one's followers that the encounter has started. It will also immediately post the encounter's inception in the <u>EMPLOYEES</u> (Active Loved One column). Furthermore, it will post the word "Administrative" in the <u>EMPLOYEES</u> (Location column). This column would typically post the address of the encounter, but since the employee does not have a smartphone to transmit a GPS signal, documenting the address is not possible.

Once the employee has provided notice the encounter with the loved one is over, simply clicking on the Departure button will send a notification to the loved one's followers that the encounter has been completed. It will promptly remove the loved one from the Active Loved Ones column on the screen and also remove the loved one's data from the <u>EMPLOYEES</u>' "Active Loved One" and "Location" columns.

The Remove button is to remove a loved one from Active status BEFORE an encounter has started. ONCE AN ENCOUNTER HAS BEGUN, THE "REMOVE" BUTTON WILL NOT FUNCTION.

NOTE: In order for the Send Admin Message system to track an employee's travel history in the Employee Encounter History (as described below), an employee MUST start their shift on the mobile app. Thereafter, every encounter performed in the Send Admin Message section will have a corresponding travel record.

NEW LOVED ONE: Here is where new loved ones are added. A list of the data fields is referenced below. Fields with unique functionality and/or logic are addressed.

First Name:

Middle Initial: This helps distinguish two loved ones with the same name

Last Name:

Gender: This helps to distinguish two loved ones with the same name

Date of Birth: This helps to distinguish two loved ones with the same name

Street:

Apartment/Unit #:

State:

County:

City:

Zip Code:

Once the fields of data have been completed, it is necessary to click "Save" in order to complete the process.

EDIT: This function enables the service provider's administrator to modify a loved one's information in the database. Once any changes are made in the fields, the "Save" button must be clicked for the changes to become effective.

Another way to access the Edit function is to click on the loved one's name in the leftmost column. It is a hot link to the loved one's information page.

DELETE: This button is used to remove a loved one from the database. Once clicked, a prompt will appear requiring confirmation of the deletion. <u>ONCE A LOVED ONE IS DELETED, THE SAFETY NOTICE SYSTEM CAN NO LONGER REPORT ON THE LOVED ONE'S HISTORICAL INTERACTIONS.</u>

COLUMNS DISPLAYED ON THE MAIN LOVED ONES' PAGE:

Name: The loved one's names are displayed in alphabetical order.

Street: Address related

Apt./Unit #: Address related

City: Address related

County: Address related

State: Address related

Zip Code: Address related

Date/Time Created: This displays when the loved one was added to the database

Imported by CSV: When a service provider initially enrolls in the Safety Notice system, an electronic upload of the provider's current loved ones is typically conducted. Thereafter, providers add new loved ones to the system manually. This column denotes a loved one who was electronically uploaded with a "Yes" in the column. Accordingly, those entered manually will have a "No" displayed.

Followers: This column lists how many followers a loved one has in the database. The number in the column is also a hot link to the followers' table.

VIEW COMPANY SCHEDULE: The Scheduler defaults to this page. It shows the company's entire schedule at a glance. The default is a weekly view for the current week. The current day of the week is highlighted in pale yellow.

Each day's appointments are noted in separate boxes. The boxes are listed vertically under the respective day of the week and are in chronological order. Historical appointments are in gray boxes and upcoming appointments are in green boxes. The beginning of an appointment's time is referenced on the left side of the appointment box. The name of the employee associated with the appointment appears after the beginning time. It is followed by the name of the loved one.

When the volume of appointments exceeds the vertical space on the page, the area below the last appointment box is appended with a notice. The notice shows as: "+ (number of other appointments). Accordingly, if there are 23 additional appointments, the notice will appear as "+23." This is called the **Additional Appointments Notice**. The Additional Appointments Notice is a hot link. Once clicked, the hidden 23 appointments will be listed. When navigating to a monthly view on the View Company Schedule module, as described below, the space allocated to each day of the week is greatly reduced. Accordingly, the Additional Appointments Notice functions in the same manner.

<u>New appointments ARE NOT scheduled through this window</u>. They are created in the Employee Schedule or Loved One Schedule functions found on the top of the screen, just below the View Company Schedule module button.

Although new appointments cannot be created in the View Company Schedule window, they can be edited. By clicking on any of the green appointment boxes (gray boxes that represent historical appointments are not accessible), the system takes you to the Employee Schedule associated with the appointment. There, the appointment can be modified or deleted. The appointment can also be modified or deleted through the Loved One Schedule.

To navigate to a different week, click the left or right arrows found on the top of the screen to the far left of the page (just above Sunday, but below the gray header bar). To navigate to a monthly or daily view, move completely across the page from the arrows and click on "month" or "day."

EMPLOYEE SCHEDULE: When this radio button is selected, the system requires the selection of an employee. Once the employee is chosen from the drop down, the employee's schedule for the current week appears.

The default view begins at 7:00 a.m. and the calendar displays through 1:00 p.m. The time before and after those in the default view are easily accessed by sliding the calendar's scroll bar. The calendar is separated in 15-minute increments.

An appointment can be added, modified or deleted from the Employee Schedule. Appointments previously created, but have yet to transpire, are in green boxes. (Historical appointments are in gray boxes and are not capable of being edited.) The length of an appointment box corresponds to the appointment's duration. This is based on the time of day vertical scale found on the left side of the page. Also, the beginning time and end time of an appointment is listed at the top left of the box. Below the time, is the employee's name associated with the appointment. The loved one's name follows the employee's.

To navigate to a different week, click the left or right arrows found on the top of the screen to the far left of the page (just above Sunday, but below the gray header bar). To navigate to a monthly or daily view, move completely across the page from the arrows and click on “month” or “day.”

LOVED ONE SCHEDULE: This is the third and final “view” associated with the Scheduler. Like the other two view windows, it shows you the loved one's appointments for the current week.

The functionality is essentially the same as the Employee Schedule. More specifically, once a loved one is selected from the drop down, the calendar defaults to the weekly view, 7:00 a.m. through 1:00 and is separated into 15-minute increments. The navigation is identical. Appointments can be added, modified, and deleted from the view.

USING THE SCHEDULER: The functionality described below is centered on appointment setting using the Employee Schedule module. The process listed is virtually identical to the process in the Loved One Schedule module.

Adding an Appointment

By clicking on the "Employee Schedules" radio button, the system then requires the selection of an employee. Once the employee is chosen from the drop down box, the employee's calendar for the current week appears.

To make an appointment, follow these steps:

Step 1: Setting the Time

Position the mouse pointer over the day and beginning 15-minute increment of the desired appointment start time. Click the mouse button but DO NOT let go. The appointment time being selected will be highlighted in light blue. Move the mouse down the time line to the desired duration of the appointment and the release the mouse button. By releasing the mouse button, the Create Appointment window will appear.

If you have made a mistake in the time creation, start over by clicking the red "Cancel" button in the lower right of the Create Appointment window.

Step 2: Selecting the Loved One

The employee's name appears at the top of the Create Appointment window, denoting the subject employee of the appointment. The employee cannot be changed from this window.

Below the employee's name is the Loved One drop down. Select the loved one who will participate in the subject appointment.

(NOTE: If the subject employee has been restricted (through the Loved One Restriction function found under the My Company tab) to only certain loved ones, only the loved ones the employee has access to will appear in the drop down.)

Step 3: Select the Frequency

The next step is to choose the frequency of the subject employee/loved one interaction. The Frequency drop down has seven choices: One Time; Weekly (Business Days); Weekly (Calendar Days); M-W-F; Tu-Th; Monthly (Business Days) and Monthly (Calendar Days). Place the mouse over the desired frequency and click it. The choice will then appear in the Frequency field.

Step 4: Confirm the Time (Appointment Duration)

The Time display is found on the right side of the Create Appointment window. The section contains three headers: Custom; Start and End. The Start and End times will be populated with the beginning and end times generated from the mouse click in Step 1. To modify these times, go under the Custom header and click in the circle next to "Yes." This will open the Start and End data fields for modification.

There are two ways to edit time in the Start and End fields. The first way is to simply click in either field. A calendar will pop up. It will default to the date and time already existing in the field. Navigate the calendar and select the month and date desired. Then, select the time from the far right side of the calendar pop up window. *(NOTE: The times in the calendar pop up are in 30-minute increments.)*

The second way to modify the Start or End time fields is to click in the respective field and directly type in it. The fields use the following format: MM/DD/YYYY HH:MM   The format must be proper for the appointment to appear accurately.

Step 5: Save the Inputs

To save the inputs and create the appointment, click the green "Save" button on the bottom right. To start over, click "Cancel."

Editing an Appointment

An appointment can be edited in several ways. The main issue to remember is only the *time* and *duration* are capable of being modified. The system is designed to preserve the employee/loved one link once an appointment has been created. To change an employee/loved one link, the appointment must be deleted using the process described below. Then a new appointment must be established that creates the desired employee/loved one link.

Editing an appointment is easily accomplished from the weekly or daily view panes in the Employee Schedule and the Loved One Schedule.   Hence, to conduct an appointment edit when in the View Company Schedule Module (any view), simply click on the subject appointment box (Remember, only green appointment boxes are capable of being edited). This will take you to the subject employee's Employee Schedule (daily view) for editing.

Time Edit

To edit the time of an appointment, click on the appointment box. DO NOT release the mouse button. Drag the appointment box to the new starting time and release the mouse.

Duration Edit

To increase or decrease the duration of an appointment, mouse over the bottom horizontal line of the appointment box. This line denotes the end time of the appointment. The mouse will turn into an up and down arrow. Click the arrow and hold down the mouse. Then, simply drag the appointment's end to the desired duration. When completed, release the mouse button.

Deleting an Appointment

As with an appointment edit, an appointment deletion is conducted from the weekly or daily view of the Employee Schedule module or the Loved One Schedule module.

To delete an appointment, mouse over the green appointment box. Click and release the mouse. The Delete Appointment window appears. There are two options for deletion in the window. Option 1, if selected, will delete the subject appointment and ALL other appointments associated with the subject appointment if there were multiple appointments created in the Frequency selection. For example, if the subject appointment was created as part of a Monday – Wednesday – Friday frequency selection, by selecting Option 1, all three of the appointments will be deleted. If one or more of the appointments has already transpired, it will remain in the system's database and it will not be deleted.

Option 2, if chosen, simply deletes the subject appointment. It has no effect on a multi-frequency appointment deletion.

Adding and Modifying Appointments Involving the Travel Time Notice

The Scheduler has a built in function that assesses the travel time from one appointment to the next. For any new or modified appointment, the system cross references the travel time database to ensure there is adequate time allocated between appointments. If the time is inadequate, an alert window appears with the time requirement and options to address the issue.

There are three types of Travel Time Notices: *Preceding*, *Following* and *Preceding/Following*. Each is described below.

Preceding

The Preceding notice appears when a new appointment's beginning time is scheduled too close to an existing appointment's end time, thus making it impossible for the employee to arrive at the new appointment on time.

When the Preceding notice appears, it provides the user three options to resolve the travel time conflict:

Option 1 is to simply disregard the notice and schedule the appointment in the time slot chosen. This is the least preferable, as it is setting the employee up for failure to arrive on time.

Option 2 automatically moves the appointment to a LATER START TIME to accommodate for the travel time. The duration of the appointment is not changed.

Option 3 enables the selection of another employee to fill the appointment. When this option is selected, the Select Another Employee window appears. The employees appearing in the drop down are filtered based on the following criteria:

1 – Omission of the subject employee due to the proven time conflict
2 – Omission of those with a schedule overlapping the subject appointment's time
3 – Omission of those that are restricted from the subject loved one (through use of the Loved One Restriction feature found under the My Company tab)

Only the employees that pass the filtration process appear in the drop down. Accordingly, once the new employee is selected, the system then checks the travel time related to their preceding and following appointments. Ironically, by selecting a new employee, the time constraints on the new employee, based on their preceding and following appointments, may be more restrictive than those placed on the subject employee.

Following

The Following notice appears when a new appointment's end time is too close to an existing appointment's beginning time. Hence, an employee will be unable to arrive at the following appointment on time if the new appointment is not modified.

When there is a travel time conflict, the Travel Time Notice appears. As described above, it has three options to resolve the conflict. Option 1 and Option 3 are the same as those in a preceding appointment scenario. However, in this instance, Option 2 is different. Option 2 automatically moves the appointment to an EARLIER START TIME to account for the travel requirement.

Preceding/Following

The third Travel Time Notice is the Preceding/Following notice. This notice is displayed when a new appointment is scheduled between two existing appointments that results in a problem with travel time on both sides of the appointment. The notice indicates there is inadequate drive time from the end of the first existing appointment to the new appointment. It and also indicates there will be inadequate drive time from the end of the new appointment to the beginning of the existing appointment that follows.

When this Travel Time Notice appears, Option 1 and Option 3 choices remain the same as in the Preceding and Following notice situations. Option 2 is different. Text contained in the message indicates how long the subject appointment would be if adequate travel time was allocated from and to the appointments on either side of the subject appointment. Accordingly, Option 2, if selected, automatically reduces the duration of the subject appointment so it can still be conducted, while allocating travel time on both sides.

Depending on the situation, the time available for the new appointment may be a negative number. This means there is no possibility of creating an appointment between the two existing appointments with the chosen employee. If this is the case, Option 2 is grayed out and not available for selection.

Editing an appointment will also bring the Travel Time Notice functionality into play. Moving an appointment to an earlier or later time may result in a travel time conflict. If so, the Travel Time Notice will appear base on the nature of the appointment's conflict.

LATE NOTICE: This feature provides a real-time notice when an employee has not clicked the Arrival notice to signify the beginning of an encounter with a loved one. The system settings are as follows:

System Status: This feature can be turned can be active or inactive. The status is determined by clicking in the circle next to the On or Off labels.

Tardiness Acceptance: This is the time (in minutes) that is deemed acceptable before the late notice is sent. The system defaults to 15 minutes. For example, assume an employee has a 10:00 a.m. appointment scheduled. If the employee clicks the "Arrival" button on the mobile app any time before 10:15, the Late Notice will not be sent. If the employee does not click "Arrival" by 10:15, the late notice will go out. The Tardiness Acceptance time can be modified by using the up and down arrows to the right of the field.

Contact Method: If a Late Notice is desired, it will be sent to an email address, text address or both. By clicking in the box next to the respective choice(s), the corresponding field(s) below will open. Once the field(s) is open, the location where the Late Notice will be sent must be entered.

LOVED ONE RESTRICTION: This function limits the loved ones that will appear on the mobile app of an employee. For example, if a home health agency has 200 loved ones they are assisting, all 200 will appear in the app's database. However, the agency owner may not want a certain employee to see the names of all loved ones the agency is assisting. Accordingly, the owner can restrict the employee to seeing only a subset of the 200 loved ones. If the employee was only interacting with five of the 200 loved ones, the owner could set up the employee's app so that only those five appear when the employee logs in to the app.

Restrict Employee Access to Loved Ones

Step 1: From the drop down, select the employee whose access will be restricted.

Step 2. In the left area labeled "Select Love Ones," place a check in the boxes for the loved ones WHO WILL APPEAR IN THE EMPLOYEE'S MOBILE APP (If no loved one are selected here, the employee will continue to have access to all loved ones in the service provider's database) and then click "Add."

The loved ones who have been selected will then be visible on the right in the section labeled, "Employee has Access to only these Loved Ones." To remove a loved one from this area, click the green "X" next to the loved one's name. Now, the employee will not have access to this loved one. IF ALL LOVED ONES ARE REMOVED FROM THIS SECTION, THE EMPLOYEE WILL THEN AGAIN HAVE ACCESS TO **ALL** LOVED ONES.

ZONE: : *NOTICE: This Early Arrival Notification and Departure Reminder features found here are only for Home Health service providers*.

Early Arrival Notification: The Early Arrival Notification and the Departure Reminder, as referenced below, use a common data field. It is the Distance Threshold Zone. The main difference between the two features is the Early Arrival Notification is geared toward administrative personnel use and the Departure Reminder is focused on assisting mobile employees.

The Early Arrival Notification was established to counter the Late Notice feature. Once employees learn the system generates a late notice to administration if the app is not used at the beginning of an appointment time, they may tend to use the app prematurely in order to circumvent the late notice being sent.

When the Early Arrival Notification is turned on, if an employee clicks "Arrival" on the app before entering inside the Distance Threshold Zone (the geographic circle surrounding the loved one's location -- as referenced on the right side of the screen under the Departure Reminder header), the system sends an alert to the business administrator. The alert shows the employee's name -- the loved one's name and the distance the employee was from the loved one's location when the Arrival button was pressed.

Early Arrival Notifications can be sent to email location and/or text message addresses. The location of where the system sends the message is determined in the Contact Method section on the left side of the screen. By placing a check next to the Email or Text labels, the respective fields below the labels open for data entry. The location where the alerts should be directed are entered here.

Departure Reminder: When turned on, its purpose is to remind an employee to click "Departure" on the mobile app after completing an encounter with a loved one. The function is based on two items: distance and time.

To signify the beginning of an encounter, an employee clicks "Arrival" on the mobile app. If the employee then travels outside the area selected in the Distance Threshold Zone field (the system defaults to ½ a mile) before clicking "Departure," the system will send the employee a reminder notice letting them know they have traveled outside of the zone. This is known as the Distance Alert.

The notice will give the employee two options: 1) end the encounter or 2) continue the encounter. The latter is to accommodate employees who may be taking the loved one on an errand that requires travel outside of the zone.

The system has a backup feature that centers on time. More specifically, if the employee does not respond to the first alert that is sent due to traveling outside of the zone, the employee will receive a second notice based on the time since the Distance Alert. This is called the Time Alert. The system defaults to three minutes from when the Distance Alert was sent. A service provider can modify the duration by changing the default number in the Time Threshold field.

If the employee does not respond to the first or second reminder alerts, the system will then send a third alert. This alert, called the Final Time Alert, is also based on time. The third alert will be sent based on the time since the Time Alert was sent. The system defaults to 30 minutes from the Time Alert. The time can be modified in the Final Time Threshold field.

NOTE: If an employee still does not respond to the Final Time Alert to end the encounter, the loved one will remain active in the system. If another employee needs to begin an encounter with the loved one that has been left active by a previous employee, the service provider can end the first employee's encounter administratively by using the Send Admin Message function.

LOVED ONE NOTIFICATION MASKING: When this function is checked, it affects how a loved one's name appears in text and/or email notifications to the loved one's followers. With the function turned on, a loved one with the name of Jane Doe would appear as Jane D in all messages to followers.

LOVED ONE APP MASKING: When this function is checked, it affects how all loved ones' names appear in the employees' mobile app. With the function turned on, a loved one with the name of Jane Doe would appear as Jane D in the mobile app's database.

<u>NOTICE</u>: Before activating this feature, service provider's are highly encouraged to check their loved ones name list for those with the same first name and same last initial. The abbreviated name environment associated with the function being activated can make the loved one's date of birth the only item an employee can use on the mobile app to distinguish between two loved ones.

NOTICE: ACTIVATION OF THIS FEATURE WILL AFFECT THE LOVED ONE "SEARCH" FUNTION ON THE MOBILE APP. THIS IS DUE TO THE FACT THAT ONLY THE FIRST INITIAL OF LOVED ONES' LAST NAME IS VISIBLE.

FIELDS DISPLAYED ON THE MAIN MY COMPANY PAGE:

These fields are initially populated when a service provider enrolls on the Safety Notice website.

Company Name: This is the legal corporate name.

Business Name: This is the business name that is know to customers.

Address:

State:

County:

City:

Zip:

Telephone:

Mobile Phone Number: This is the number where text notifications will be sent if "Receive Notification" below is activated.

Contact Last Name:

Contact First Name:

Receive Notification: With this activated, the company will receive notifications each time an employee interacts with a loved one.

Contact Method: When "Receive Notification" is activated, this determines how the company will receive the message.

Email: This is the email address that the company uses to login to its administrative function on the Safety Notice website. It is also where the company will receive correspondence from Safety Notice. Finally, it is the address where notifications will be sent if “Receive Notification” is activated.

Password: This is the second data entry required for the company to login to its administrative function on the Safety Notice website. The password requires a minimum of eight characters.

Provider Type: This is where the service provider selects the nature of the business: either Home Heath or Transportation.

EMPLOYEE EXISTING LOCATION: When the Track tab is selected, this is the default function. Here, every employee that is logged in to the mobile app will appear on the map. As the employees move throughout the day, their location is updated on the map every 10 seconds.

The icons appearing on the map represent the employees. They are color coded. The colors are based on those assigned in the Designations sub function. (For example, if the designation of RN was linked to the color blue, then all blue icons on the map would be RNs.) An icon also has the employee's first and last initial on it. An employee named John Doe would have JD on his corresponding icon. To see the employee's full name and designation, simply click on the icon.

EMPLOYEE BASE LOCATION: This function is to assist with scheduling. The theory is that if a service provider can see where employees begin their day, a more efficient schedule can be created for loved one appointments.

In this function, the employee icons are still color coded based on the designation that has been assigned to them. The employee's initials are also on the icon. The main difference in the mapping is the icon WILL NOT move during the day. They are static and their position is based on the location listed in the employee's "Address" field in the database.

Select Loved One: When a loved one is selected from the drop down box, the loved one's location (as listed in the Address field in the database) will appear on the map as a red star. Thereafter, visual inspection of the map will show which employees are in closest proximity to the loved one's location. Furthermore, by clicking any employee's icon, the distance from the loved one's address will be displayed.

EMPLOYEE ENCOUNTER HISTORY: This function maps an employee's encounters with loved ones during an employee's shift. The two main outcomes associated with the mapping result in a service provider being able to 1) document an employee's drive time between encounters and to 2) document an employee's driving distance between encounters.

NOTE: As referenced in the Loved One section, in order for an employee's travel history to be documented using the Send Admin Message function, an employee must start his/her shift from the mobile app. Otherwise, loved one encounters conducted using the Send Admin Message instead of the mobile app will not register in this section.

The Employee Encounter History page is divided into three sections: Employee & Period, Results and Map. Each are explained below.

Employee & Period: From the Select an Employee dropdown box, choose the employee who is subject of the review. To follow, the system enables the user to examine a single shift or multiple shifts. Accordingly, enter the beginning date in the Start Date field and the ending date in the End Date field to review all shift for the period chosen. Next, click "Generate Results."

Results: The Results section contains the findings from the employee and period of time and entered. The period selected will be displayed directly below the section's header. Below the period is the summary of the total mileage driven and travel time for the period selected.

In the chart, shifts are separated. Hence, if a two-week period was selected and the employee had seven shifts during the period, the seven shifts would appear in chronological order and be labeled Shift #1, Shift #2, etc.

The chart contains rows and columns. Each row represents a single encounter with a loved one. The columns, and their nuances, are described below:

> Date: This is the date an employee's shift began. If an employee's shift carries over past midnight, any encounters thereafter will display the new date commencing at midnight. Hence, there can be one shift with two separate dates.
>
> Leg: This column's first entry for a shift always begins with "B – F," which is commonly referred to as "base to first." This means the employee's base (home location) to the first loved one appointment. Here, the system always uses the employee's base address, as entered into the service provider database, to calculate the data.

If an employee has more than one loved one encounter during a shift, the chart will automatically add rows to reflect each encounter. To follow, this column will then show a "leg" count. More specifically, a "1" will denote the leg of the shift from the first loved one encounter to the second loved one encounter. Thereafter, a "2" in this column will refer to the leg of the shift from the second encounter to the third encounter. The numbering continues as such as the encounters increase.

When an employee has completed all loved one encounters for a shift, the "End Shift" functionality is clicked on the mobile app. The chart will denote the shift has ended with "L – B" in this column. This is commonly referred to as "last to base:" meaning the employee's last appointment en route to the employee's base (home). Accordingly, there will be no rows for a shift following the L – B notation. As with B – F, the system uses the employee's address in the service provider database to calculate the data associated with L – B.

Loved One: This column lists the name of the loved one associated with the employee's encounter.

Distance: This is the distance associated with the "leg" of a shift. It is listed in mileage. For example, Leg 1's distance will be the miles between the employee's first encounter and the second encounter.

When the term "Admin" is displayed, it means the employee did not use the mobile app to generate the results. Rather, the service provider sent the encounter notifications administratively. This is accomplished using the Send Admin Message feature. Here, the system used address coordinates in the service provider's database to generate the results.

There is an icon on the far right of this column. It is color coded as it relates to that leg's display on the map. By clicking on the icon, the leg will become visible on the map.

Time: This is the time related to the leg of a shift. It is calculated in minutes. For example, Leg 1's time will be the minutes it takes to travel between the employee's first encounter and the second encounter.

Like the Distance column, when the term "Admin" is displayed here, it means the employee did not use the mobile app to generate the results. The service provider sent the encounter notifications administratively using the Send Admin Message feature. Again, the system uses address coordinates in the service provider's database to generate the results.

Once a shift has concluded, a summary of the shift's time and distance is referenced at the bottom of the chart. All of the shifts that are subject of the period selected are summarized and displayed at the top of the chart. *NOTE: THE SUMMARY INCLUDES B – F AND L – B DISTANCE AND DRIVE TIMES. THESE CAN EASILY BE INCLUDED OR EXCLUDED FROM A PAYROLL UPLOAD IN THE SERVICE PROVIDER ADMIN SECTION.*

Map: The third section of the page is a map of the employee's encounters for the shift. The default of the map scales to the territory surrounding the address of the service provider's business. Additionally, the map shows an icon at the depicting the location of the business.

Each leg on the map has a color. It is color coded to match the color of the icon in the leg's Distance column. As noted above, by clicking on the icon in the Distance column, the respective leg will appear on the map. On top of the map, the shift number, leg number and loved one associated with the leg will also be displayed.

Glossary

Active Loved One(s): The Loved One(s) who is/are currently being visited with by an employee

Additional Appointments Notice: The popup menu of the remaining appointments for a given day when there are too many to show on the calendar view

Admin Message: A message sent by the employer to the followers of Loved Ones when the employee interacting with the Loved One does not have a smart device

Company Schedule: The calendar view of appointments for all employees

Departure Reminder: A notice that appears on an employee's device when they have left the Loved One's zone without selecting the "Departure" button

Designation: How an employee is categorized

Early Arrival Notification: An admin notification when employees select "Arrive" too early before they have entered the zone around a Loved One

Employee Base Location: Where an employee starts their day

Employee Existing Location: Where an employee is currently located

Employee Schedule: A calendar view of appointments for the selected employee

Employee Travel History: All of the archived trips an employee has made

Encounter: An interaction with a Loved One by a Home Health Agency

Follower: A family member or friend of a Loved One who will receive updates regarding the Loved One's activities

Frequency: How often an appointment occurs

Late Notice: A real-time notice when an employee has not clicked the "Arrival" notice to signify the beginning of an encounter with a loved one

Local Database: When there is no cellular service, the app saves the user's input to a local database. When the user reenters a service area, the app immediately synchronizes and updates the Safety Notice main server.

Location Function: If a user is in a building with limited or no GPS connectivity, the app is set up to employ the 3G or 4G signal from the phone's service carrier.

Loved One: A Safety Notice term for a senior or special needs family member who is being cared for

Loved One App Masking: A way to hide last names from employees within the app

Loved One Notification Masking: A way to hide the last names from the followers receiving notifications

Loved One Schedule: A calendar view of appointments for the selected Loved One

Map: An admin feature to see where employees are located at a given time

Message Archives: A catalog of all the messages sent using the Reach Out function

Notification: The text/email that is sent to family members following an employee's interaction with a Loved One

Reach Out: A Safety Notice feature used by companies to quickly staff appointments

Loved One Restriction: This function limits the loved ones that will appear on the mobile app of an employee

Scheduler: A calendar with functionality to view, create, and edit appointments

Search Function: A way for employers to quickly find employees

Shift: A block of time when an employee works with Loved Ones

Tardiness Acceptance: This is the time (in minutes) that is deemed acceptable before the late notice is sent

Travel Time Notice: The popup box that appears when there is not enough time for an employee to travel to/from an appointment being scheduled

Zone: The area around a Loved One that designates when an employee has entered/exited without following procedure