

WHAT IS “AT YOUR FINGERTIPS”?

“At Your Fingertips” is a bi-monthly tip sheet to help providers navigate Electronic Visit Verification (EVV) by answering common questions and providing assistance for resolving common issues encountered by providers in their use of the EVV system.

This tip provides instruction on how to utilize the mass editing functionality in Santrax. With this you will be able to make changes on multiple entries within the scheduling screen of Santrax.

NOTE: Questions or issues containing client PHI must be sent via encrypted/secure e-mail to the resource addresses noted in this document.



Not sure who to contact when you have a question or issue, or if your issue needs to be escalated?

Contact DXC Technology via e-mail to: ctevv@dx.com

Please only send client PHI in an encrypted/ secured email.

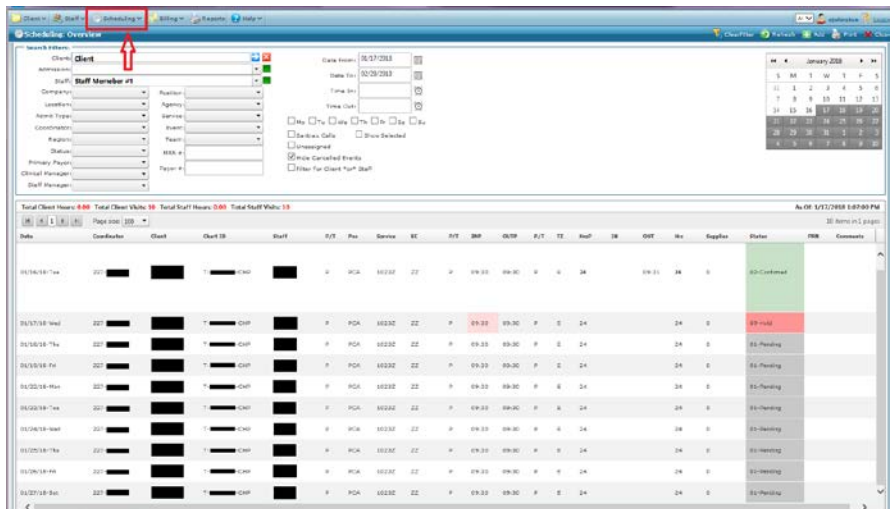


EVV TIP # 20 MASS EDITING SCHEDULES

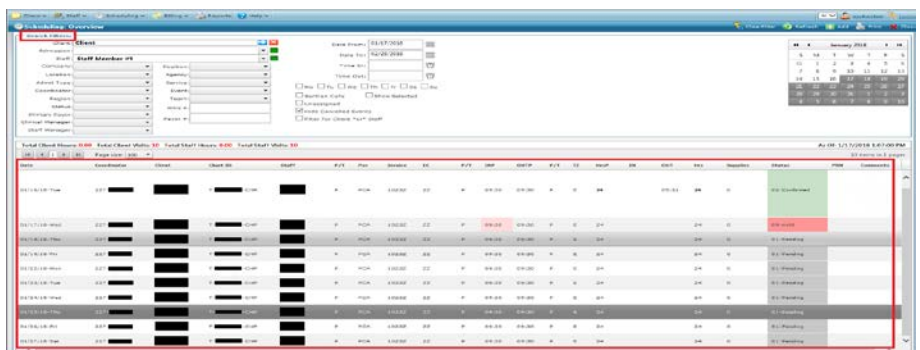
Mass editing schedules is a time saving procedure that assists in making multiple changes for a specific client's schedule all at one time. One of the many benefits of this functionality is being able to change the scheduled staff member in a single edit instead of editing each visit in the schedule.

HOW TO MASS EDIT SCHEDULES:

1. Click on Scheduling to access the schedule overview screen.



2. Narrow your results. Use the search filters to return only the appropriate schedules.



3. Select the schedules you would like to edit. Press and hold the <Ctrl> key while selecting the schedule(s) you want to edit to select multiple entries at once.

In the example below, a search was performed for a particular staff member under a specific client. All schedules associated with this staff member will be mass edited, and a different staff member added to the schedule.

Scheduling: Overview

Search Filters:

- Client: Client
- Admission: Staff Member #1
- Company: [Dropdown]
- Location: [Dropdown]
- Admit Type: [Dropdown]
- Coordinator: [Dropdown]
- Region: [Dropdown]
- Status: [Dropdown]
- Primary Payor: [Dropdown]
- Clinical Manager: [Dropdown]
- Staff Manager: [Dropdown]

Date From: 01/17/2018
Date To: 02/28/2018
Time In: [Dropdown]
Time Out: [Dropdown]

☐ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su
☐ Santrax Calls ☐ Show Selected
☒ Hide Cancelled Events
☐ Filter For Client *for* Staff

Remember to press and hold the <Ctrl> key while selecting the schedules you want to edit to make multiple selections for mass editing.

Total Client Hours: 0.00 Total Client Visits: 10 Total Staff Hours: 0.00 Total Staff Visits: 10

As Of: 1/17/2018 1:07:00 PM

Date	Coordinator	Client	Chart ID	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TE	ResP	IN	OUT	Res	Supplies	Status	PRN	Comments
01/16/18-Tue	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24		09:31	24	0	02-Confirmed		
01/17/18-Wed	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	09-Hold		
01/18/18-Thu	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/19/18-Fri	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/22/18-Mon	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/23/18-Tue	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/24/18-Wed	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/25/18-Thu	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/26/18-Fri	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/27/18-Sat	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		

4. Choose which category you would like to mass edit. Right click within the results and hover over "Mass Edit". A second menu will appear and from here you will choose what kind of change you would like to make. In our example we are going to choose "Staff".

Scheduling: Overview

Search Filters:

- Client: Client
- Admission: Staff Member #1
- Company: [Dropdown]
- Location: [Dropdown]
- Admit Type: [Dropdown]
- Coordinator: [Dropdown]
- Region: [Dropdown]
- Status: [Dropdown]
- Primary Payor: [Dropdown]
- Clinical Manager: [Dropdown]
- Staff Manager: [Dropdown]

Date From: 01/17/2018
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Time In: [Dropdown]
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☐ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su
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01/26/18-Fri	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		
01/27/18-Sat	227		T-CHP		P	PCA	10232	ZZ	P	09:30	09:30	P	E	24			24	0	01-Pending		

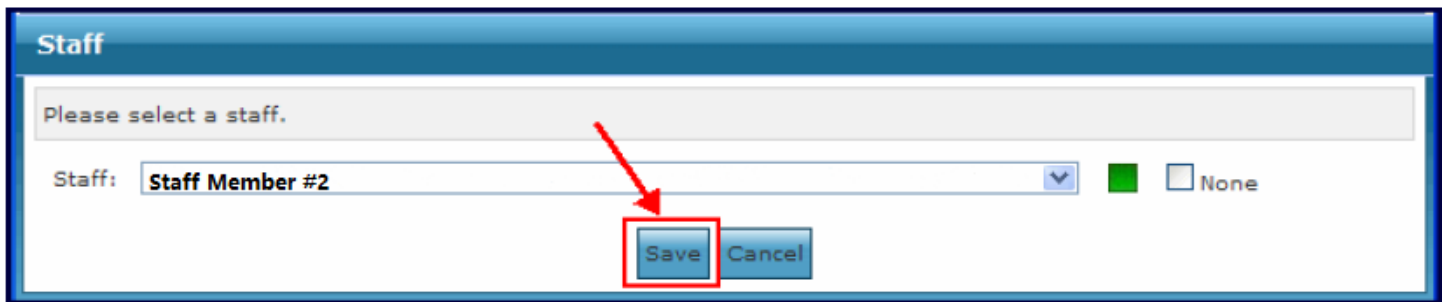
Context Menu:

- Open
- Select All
- Select None
- View
- Mass Edit
- Copy Forward
- Refresh Rates

Sub-menu:

- Client
- Event Code
- Service
- Status
- Times
- Bill By
- Pay By
- Staff

5. A pop-up box will appear and allow you to make the necessary changes.



The screenshot shows a pop-up window titled "Staff". At the top, there is a grey instruction bar that says "Please select a staff.". Below this is a dropdown menu labeled "Staff:" which currently displays "Staff Member #2". To the right of the dropdown is a green square icon and a checkbox labeled "None". At the bottom of the window are two buttons: "Save" and "Cancel". A red arrow points from the instruction bar down to the "Save" button, which is also enclosed in a red rectangular box.

Once you have made your selection, click **save**. Now your change has been made for multiple entries and will be reflected in your results screen.