Create a Shift

Shift scheduling is done in a few locations. It can be done under the 'Scheduling' section of the main navigation on the left under the name of 'Shifts'. From here, a shift start and end time is created, along with a client, and billing rate(s). It is not required to fill out the person that it is assigned to. If a shift is assigned to a caregiver, it will show up for them on their own profile schedule. If you access the caregiver's profile, it is located under the 'Scheduling' tab as 'Scheduled Shifts'. These same shifts show up in the 'Caregiver Schedule' section of the client in their profile.

Within the 'Scheduled Shifts' section, users can schedule a new shift for a client profile. On the 'Caregiver Schedule' screen, click the 'New' button to get to the 'Add New Shifts' screen:

Add New Shifts Screen

1 – Client

The client is automatically displayed in this field.

2 – Assigned to

Select the caregiver whom you want to work the shifts. As usual, start typing the name, and CoActiveSoft will present you with options that match what you typed. Keep in mind, however, that CoActiveSoft will only allow you to select active caregivers or nurses.

3 – Service Product

Select the service the caregiver will perform for the client. See the CoActiveSoft Financial Management user manual for more information.

4 – Time Zone

CoActiveSoft defaults to the agent's time zone. If this is not correct, select the time zone for the client's location.

5, 6 – Shift Starts and Shift Ends

Select the date and time the shift starts and ends. Note that CoActiveSoft prevents you from scheduling a caregiver to more than one client at a time.

7 – Unpaid Minutes

If a caregiver takes an unpaid break during a shift, the agent can enter the duration of the break in this field. Invoices will subtract the unpaid duration from the period for which the client is invoiced (See the CoActiveSoft Financial Management user manual for more information).

8 – Caregiver Wage

A wage that is entered here will be automatically entered in the payroll report. See the CoActiveSoft Reporting user manual for details.

9 – Billing Rate

The billing rate field is very similar to the Caregiver Wage field, but instead of on the payroll report, it is used on the invoice. For more, see the CoActiveSoft Financial Management user manual.

10 – Details

This field allows the agent to add a note for further clarification. The caregiver will see this note when looking at his/her schedule. See the CoActiveSoft Caregiver Portal user manual for details.

11 – Enable Alerts

In case the caregiver doesn't start the shift on time, both the caregiver and the supervisor can be alerted through a text message.

12 – Billable

Because most shifts are billable, by default, this check box is checked which makes the shift appear on the invoice. If the shift is not supposed to be invoiced, uncheck this box. See the CoActiveSoft Financial Management user manual for more information.

13 – Taxable

If this box is checked and QuickBooks integration is activated, QuickBooks will apply the proper sales tax.

14 – Enable QB Sync

By default, this box is checked, making this shift available for QuickBooks integration. If for some reason, this shift shouldn't be communicated to QuickBooks, this box should not be checked.

15 – Recurring Shift

See the 'Schedule a Recurring Shift' section to learn how to schedule a recurring shift.

Caregiver Schedule Overview

The 'Caregiver Schedule' section is available for clients. The Caregiver Schedule is accessed through the profile of a client under 'Scheduling' tab and 'Caregiver Schedule' section, telling users which caregiver will work for the client at what time. By default, when clicking on the Caregiver Schedule section, CoActiveSoft will display all shifts for the current month. This section provides a description of the basic functionality of the caregiver schedule.

This shift schedule also shows up in the caregiver's profile as 'Scheduled Shifts'.

Caregiver Schedule Screen

1 – Date/time Selection

Select the begin and end date and time for the shifts you want to view.

2 – Quick View

This calendar tells the user for what day a shift has been scheduled. Any day that is marked with a yellow circle shows that at least one shift has been scheduled. Click on a date with a shift, and CoActiveSoft takes you to the list of shifts.

3 – View Report Button

When viewing the caregiver schedule for a client, the agent can choose to view the caregiver hours report for the selected date/time period by clicking on the 'View Report' button. See CoActiveSoft Reporting user manual for details about the client hours report.

4 – Set State

Instead of opening a shift and changing the state of the shift on the Edit screen, agents can select one or more shifts and change the state with the Set State drop down menu. With this button, it is also possible to set the payroll state of one or multiple shifts at the same time.

5 – Assign Caregiver Button

With this button, you can set the caregiver for multiple shifts at one time. After typing in the desired caregiver to add to each shift, the conflicts (if any) will be shown and you must acknowledge them before saving.

6 – Clone Button

See section 'Cloning One or More Shifts'.

7 – Delete Button

This button deletes one or more shifts.

8 – New Button

See previous section 'Create a Shift' for details.

9 – Select Box

Users can select an individual shift or all shifts by selecting the top check box.

Caregiver Schedule Details (Shifts)

The previous section elaborated on the basic functionality of the caregiver schedule. This section takes a closer look at the individual shifts.

Caregiver Schedule Screen

1 – Log Entry

Anything about a shift that needs to be documented can be added as a log entry for a shift.

2 – Edit Shift

The edit shift button opens up the same input as a New Shift box, but is editable. Change the time, client, caregiver, amount, etc.

3 – Delete Shift

If a shift was created in error, it can be deleted by clicking this button. Note, that it is also possible to cancel a shift without deleting it. This can be done by editing the shift and then changing the state to 'Canceled'

4 – Shift Availability Message

If a new message becomes available and the agent needs to find a caregiver for the shift, the agent can send a broadcast message to all caregivers who are set up to receive shift availability messages (see the Messaging Subscription part of the CoActiveSoft Profile Management user manual for details). Clicking on this button brings up the message window. If the agent chooses, he can edit the message before sending it:

CoActiveSoft Messaging Message Creation Screen

Travel Shifts

There might be scenarios where caregivers need to drive from one client to the next. If CoActiveSoft detects two shifts close to each other with different clients, it will give the option to create a travel shift.

After clicking on the Travel Shift button, you will be prompted to save a travel shift between the two shifts already created.

Schedule a Recurring Shift

Most shifts for home care caregivers are recurring shifts. That is, shifts are scheduled for the same time on a particular day of the week, week after week. CoActiveSoft makes scheduling a recurring shift easy. Check the Recurring Shift check mark, and CoActiveSoft will expand the Add New Shift screen to look like this:
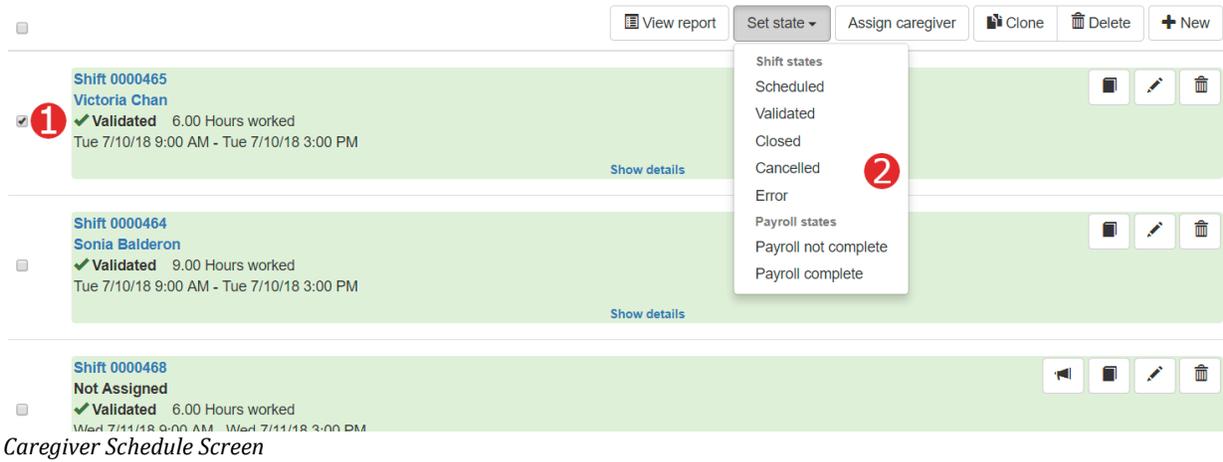

By entering a number (1) and selecting Day, Week or Month (2), the agent can determine the frequency of the shift recurrence. The agent can also select whether the shift needs to recur on one or more days of the week (3). Finally, shifts will not recur indefinitely. To avoid having to delete numerous shifts later, the agent can set an end date for shift recurrences (4).

Expanded Add New Shifts Screen

Change a Shift's State

Although the state of a shift should change as the caregivers log in and out, invoices are generated, etc., sometimes the state of a shift needs to be changed manually. To do so, on the Caregiver Schedule screen, select a shift (1), click the Set State button (2), and select the proper state from the drop-down list:

Caregiver Schedule Screen

Here, you can set the state of the shift to 'Scheduled', 'Validated', 'Closed', 'Cancelled', and 'Error. In addition, the payroll state can be set to either 'not complete' or 'complete'.
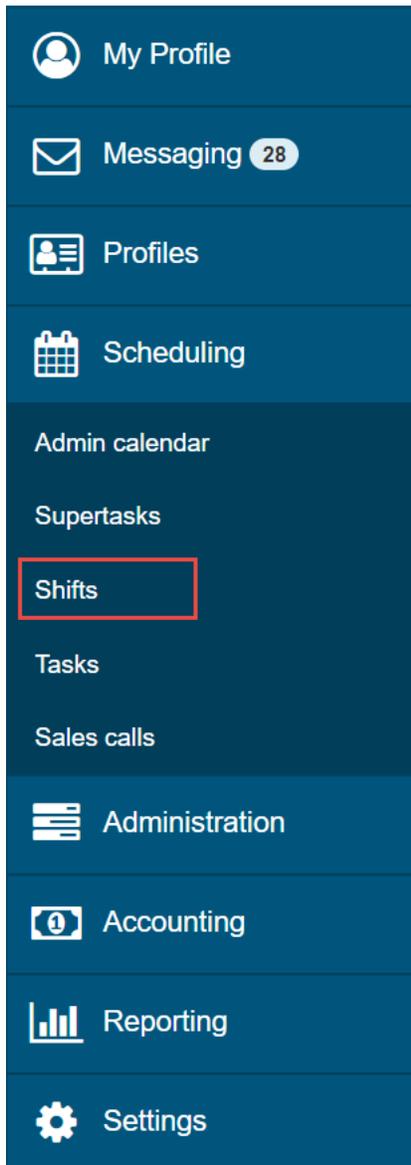
Monitor Shift Status

Although CoActiveSoft provides a time tracking mechanism for caregivers, the agent may want to monitor the status of the caregivers' work assignments to make sure the clients receive the promised care and the data in CoActiveSoft is accurate. The Shifts option in the Scheduling section of the main menu helps agents do that.

Main menu with Shifts option

As with most CoActiveSoft interfaces, the Shifts screen allows users to view a date range, a specific profile (or, by default, all of them) and the state of the shifts.

On the Shifts screen, the agent can clone (1), delete (2) or create (3) a shift. Most importantly, the agent can change the state of the shift to validate or invalidate as needed (4). Similarly, the agent can also change the payroll state to complete or not complete in the same place. If the agent would like to change who is working each shift, they can select the shifts and click on 'Assign caregiver' (5). This button automatically checks for conflicts then assigns the selected shift(s) to the designated caregiver. By clicking on the QB Sync button (6), agents can send the selected shift(s) to QuickBooks to process payrolls. The QB Sync button will not show unless you have already linked your QuickBooks account under the 'Accounting' section on the main navigation bar on the far left side of your screen.

If the agent wants to monitor shifts for a longer duration, it may be more convenient to download the data into a spreadsheet by clicking the CSV button (7).

In the top right corner you also have the ability to reset search criteria for the shifts, refresh the shifts, and advanced search through all of the shifts (8). Once you click on advanced search, the search criteria shows up underneath the date range (9). You can search by profile, tag, state, and assignment status. Search by assignment status is particularly useful if you have a block of time that you want to be a shift but do not know who will fill it yet.

Clicking on the Show details button (10) will give you information about the shift, both before and after it happens. In this area, you can view where the shift took place based on the location of the caregiver's phone when clocking in or out. This feature works if location is allowed on their phone and is most accurate when the phone has GPS capabilities.
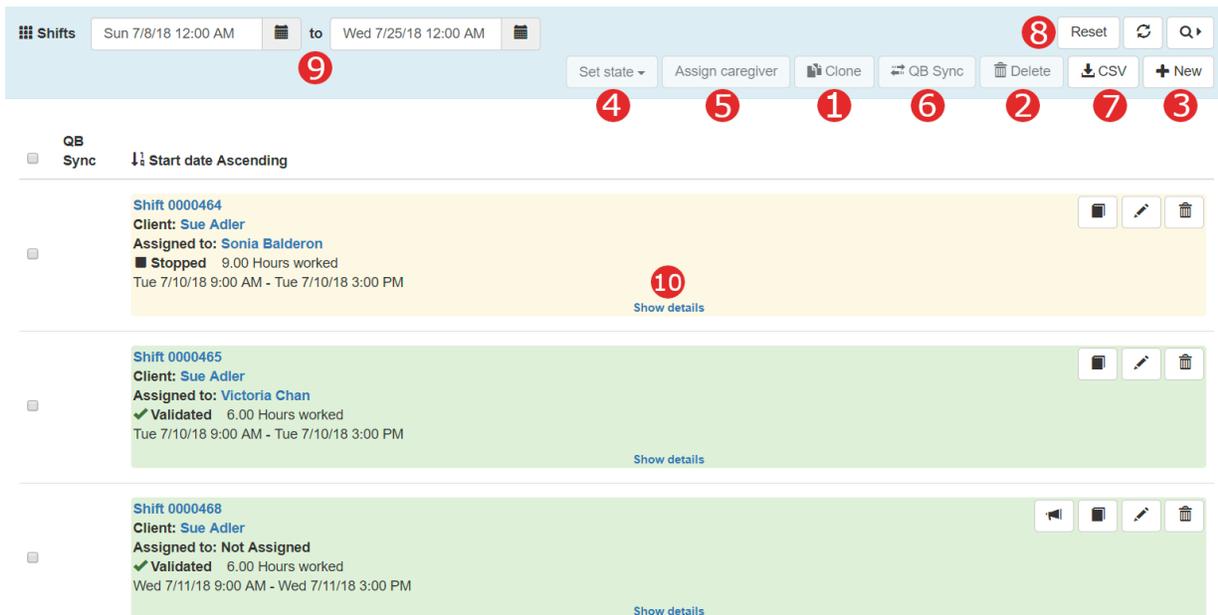
Shift screen

At one glance, the agent can see all shifts for the selected period. You can change the period in the top left (9). Depending on whether the caregiver logged out correctly and depending on whether the client or the agent validated the shift, the shift status may be any of the following:

> info@coactivesoft.com
> 206-248-1884
> 2115 SW 152nd Street, Seattle WA 98166

Validated

Either the client or the agent validated that the caregiver worked the shift as scheduled. The shift is colored in green.

Scheduled

A shift that is still scheduled, even though the start time and perhaps the scheduled end time is in the past, is colored in yellow. In this case, either the caregiver did not sign and out as he/she is supposed to, or the caregiver did not work the shift at all.

Started

In this case, the caregiver logged in but did not log out, either because he/she is still working or because he/she forgot to do so.

Stopped

The caregiver logged in and out, but neither the client nor the agent validated the shift.

Clone One or More Shifts

Setting up a recurring shift is the most convenient method of scheduling ongoing shifts, as long as the schedule is regular and known in advance. Sometimes, that isn't the case, and shifts are scheduled as needed. In that case, cloning a shift may be the most convenient solution. On the Caregiver Schedule screen, select a shift (1) and click the Clone button (2):

Caregiver Schedule Screen

As soon as the agent clicks the Clone button, CoActiveSoft presents the Clone Shift screen:

> info@coactivesoft.com
> 206-248-1884
> 2115 SW 152nd Street, Seattle WA 98166

Clone Shift Screen

The days that are highlighted in yellow on the calendar are not available for cloning because the shift would cause a conflict. If the agent selects any other day, CoActiveSoft will display the Add New Shift screen, allowing the agent to go through the same process he/she would when creating a new shift from scratch.

CoActiveSoft allows agents to select more than one shift at a time. In that case the range of available days on the Clone Shift will be narrower, as CoActiveSoft assumes that the new shifts will be scheduled for the same days of the week as the original shift. It is possible to revert this assumption by deselecting 'Clone to same days of week'. In addition, when cloning multiple shifts, the Add New Shift screen will not be displayed after the Clone Shift screen; the new shifts on the specified dates are immediately created.