



## Approve Visits Best Practices

With the transition from paper timesheets to Electronic Visit Verification (EVV), the time sheet approval process also must change. Pavillio is designed to give the agency full visibility of all visits including currently running, drafts, and those waiting for client/responsible party approval. Once a visit record has been signed by both the caregiver and the client, Pavillio checks for a series of warnings. This is a major advancement from paper timesheet entry and automates many of the manual processes of paper timesheets.

The approval process for records moves all visit records through these two important steps before combining them all together for final approval. Completing this process will allow you to view all time worked, including caregivers with overtime, BEFORE approving these visits.

### **Incomplete**

The incomplete card is the first step in Approve Visits. This will show visits throughout the entry process.

- Open visit – This is a visit that is actively running.
- Draft – The caregiver has clocked in and out but has not signed and submitted the visit record.
- Unapproved – The caregiver has submitted a visit record and the record is now waiting for client/responsible party signature.
- Client Rejected – The visit was submitted by the caregiver and was rejected by the client/Responsible party. This record has been sent back to the caregiver for corrections.

Visits in the incomplete card can be selected and a notification can be sent to the caregiver/client/RP to remind them that a visit record needs to be submitted. This comes via email, internal notification, push notification.

If the service does not require a client/RP signature, or the client/RP is unable to sign off on the visit, the agency can select an unapproved visit and Complete Visit. Completing the visit will move the visit record on to Warning if any of the warnings apply to that record or moved on to Pending Approval. Once all visit records for the pay period have been completed, move on to the Warning Card.

### **Warning**

Pavillio checks all visit records for several issues, these display as warnings. The Warnings that are checked include:

- Beyond Geo-Fence – the visit was started or stopped outside of the geo-fence boundary set in Configurations or location services are not turned on/available on the device that was used to clock in.
- Client Override Enabled – the client override in the client profile was turned on when the visit record was entered. This bypasses eligibility and unit validations and these records should be manually reviewed.
- Clock- in and Clock-out Edited – a real-time visit was started and either the clock in or clock out time, or both, were edited.
- Force Clock out – the caregiver failed to clock out of this visit and the system ended the visit based on the force clock out configuration (default is 24h)
- Invalid – this is a visit that is less than 7 minutes long (or less than half of the unit of measure) and is not a valid billable visit. These can be approved (going into the invalid card) to capture the visit notes and payroll time associated with these visits but will not go to Claims Management for billing.
- Late Clock-in – When a visit is scheduled and the caregiver does not clock in within the threshold set in configuration (default is 10 minutes), the visit will be flagged as late clock-in.
- Manual Timesheet Entered – this visit was entered through the manual entry process, not created as a real-time visit and will not comply with EVV requirements.

- **Overlap Timesheet** – There are two visits for a client or caregiver for two different service lines that overlap. Pavillio does not allow for two overlapping visits for the same service line but if there are 2 visits that overlap for two different services, these should be manually reviewed.

If more than one warning flag is present on the record, an information icon will display (i). This will show all of the warnings that apply to that visit record.

From the Warning card, the best practice for checking these is to use the warning filter and look at one warning type at a time. This will allow you to work with all the visits that were Manually entered, for example, and move them to Pending Approval if they're valid.

If the visit record is not valid and needs to be corrected, it can be changed back to draft by selecting the record and Change to Draft. This will send the record back to the caregiver for correction.

There is an edit option in the Warning card. The time in and time out can be edited as well as the service code. These can be changed and a reason for edit note added before moving to Pending Approval. All records for the pay period that you're working on should be moved out of the warning card and into Pending Approval before approving the visit records.

#### **Pending Approval**

Once all records have been moved into Pending Approval, the records can be Grouped By None, Client, Employee.

- **None**- allows you to see all individual visit records for the pay period
- **Client**- allows you to view total hours served by client/service line
- **Employee**- allows you to view the total hours each employee worked for that period by service line.

These visits can be edited, changed to draft for the caregiver to correct or placed on Hold while you wait for additional information. Placing a record on hold will allow you to select all other records and finalize, without having to go through each employee individually due to a few visits you want to hold back.

An additional feature in Pending Approval is the ability to look at a **payroll week**. This will allow you to select each week of your pay period and view the regular and overtime hours. These regular hours and OT hours columns can be used to sort the hours so you can specifically at those with overtime and make sure these are correct before finalizing the records. You'll also be able to see all visits that make up the total hours.

#### **Hold**

From Pending Approval, you have the option to select a record and place it on hold. A reason to do this may be that you are waiting for verification from the caregiver that the visit is accurate. To do this, you'll select the record and click on Hold. This will move the record into the Hold card and it will remain there (displaying the count of records in this card) until you're ready to move forward with that record.

#### **Approved/Invalid**

Once the visit is finalized, the record will move into either Approved or Invalid.

Approved records are valid, billable records. They will remain here for future reference.

Invalid records are records that are not billable- these are less than half of the unit of measure. For example, if you're working with a service that is billing in 15 minute units, a visit record that is less than 7 minutes is not billable. However, the service may have been provided, even for 5 minutes, and the service time is used for employee payroll and visit notes that have been entered for these services will be captured and remain with these visits.

Once visits are finalized, they will be considered for both billing and payroll.