

Telephony (IVR) Guide

Telephony Clock-in

To clock in with telephony,

- Arrive at the client's residence
- Report arrival via telephony from the client's phone number (example call below)
 - Please enter your user ID followed by # sign.
 - Please enter your PIN followed by # sign (if you have one).
 - To select X am arrival, press 1. Press 99 to hear your schedule for tomorrow.
 - Arrival time is X pm. You should complete your visit at X pm.
 - Your arrival has been reported. Thank you.
- Complete your visit
- Report departure, including care plan items, via telephony from the client's phone number (example call below)
 1. Please enter your user ID followed by # sign.
 2. Please enter your PIN followed by # sign.
 3. To select departure, press 1. Press 99 to hear your schedule for tomorrow.
 4. Departure time is X pm.
 5. Please report the value or status of the following items:
 6. [Item] is complete, press 1; if not needed today, press 2; if client refused, press 3
 - Repeat as needed
 7. If care plan item status are acceptable, press 1; to re-enter care plan item status, press 2.
 8. Are there any concerns you'd like to share with the office about the patient's condition?
Press 1 for yes or 2 for no.
 9. Your departure has been successfully reported. Thank you.
- Depart the client visit location (do not leave until departure is reported)

Telephony Clock-in with FOB

First, let's define a FOB.

A FOB, or fixed object device, is used to verify date, time, and location. This device can be attached via zip tie to a doorknob or other fixed location. When the button is pressed, it creates a random code that you will write down. You will press the button at the start and end of every visit to create two codes. These two codes will prove you were at the right location at the right time for clock-in and clock-out, and you will key them in during calls.

To clock in with telephony and a FOB,

- Arrive at the client's residence
- Click the FOB and write down the arrival code
 1. *If you are able, call now to report the arrival and use the arrival code; if not, call later*
- Complete your visit
- Click the FOB again and write down the departure code (keep both codes!)
 1. *If you are able, call now to report departure and use the departure code; if not, call later*
- Report arrival as you are able using the FOB code, calling the telephony line (example call below)
 1. Please enter your user ID followed by # sign.
 2. Please enter your PIN followed by # sign (if you have one).
 3. Please select action from the following list:
 - To select Name arrival, press 1
 4. Please enter the code generated by the FOB device followed by # sign. (Enter the **arrival** code)
 5. Arrival time is X pm. You should complete your visit at X pm.
 6. Your arrival has been reported. Thank you.
- Report departure as you are able using the FOB code, calling the telephony line (example call below)
 - Please enter your user ID followed by # sign.
 - Please enter your PIN followed by # sign.
 - Please select action from the following list:
 - To select Name departure, press 1
 - Please enter the code generated by the token device followed by # sign. (Enter the **departure** code.)
 - Departure time is X pm.
 - Please report the value or status of the following items:
 - [Item] is complete, press 1; if not needed today, press 2; if client refused, press 3.
 - Repeat as needed
 - If care plan item status are acceptable, press 1; to re-enter care plan item status, press 2.
 - Are there any concerns you'd like to share with the office about the patient's condition? Press 1 for yes or 2 for no.
 - Your departure has been successfully reported. Thank you.

Remember, always report arrival with the arrival code **first**, and the departure call with the departure code **second**. If you report codes out of order, they will not work!