

CubHub Calendar

Calendar Overview

Client: filter by patient

Assignment Status: filter by calendar event statues

Employee: filter by employee

Select Options: multi-select calendar events

Action Options: Expand all
Days, Collapse all Days, Find
Assignment by ID, Clone, Print

Calendar: change view to week or month

Advanced Filter Options

Team: will default

Care Manager: will default

Admin Manager: will default

Calendar

Client

All

Show

Open

Employee

All

September 2021 - 0 (v) - 0 (h)

TODAY

<
>
WEEK

SUN	MON	TUE	WED	THU	FRI	SAT
5	6	7	8	9	10	11

OPEN

SCHEDULED

WORKING

SUBMITTED

MISSED

NON-CLINICAL

VERIFIED

NON-BILLABLE














Calendar Overview

- See total hours and visits based on view options
- Use calendar icon to select date.
- Scheduled shifts show in a compacted view that can be expanded.
- Users are shown the total number of visits and hours scheduled above the calendar view & in each day.
- Click the + to expand the visits.
- Click the – to minimize the visits.
- If filtered by patient or employee, visits automatically populate in expanded view.

September 2021 - 13 (v) - 89 (h)							WEEK ▾
SUN 12	MON 13	TUE 14	WED 15	THU 16	FRI 17	SAT 18	
Visits - 2 Hours - 19	+ Visits - 2 Hours - 17	+ Visits - 1 Hours - 8	+ Visits - 1 Hours - 12	+ Visits - 3 Hours - 7	+ Visits - 2 Hours - 13	+ Visits - 2 Hours - 13	
<div> <div>OPEN</div> <div>SCHEDULED</div> <div>WORKING</div> <div>SUBMITTED</div> <div>MISSED</div> <div>NON-CLINICAL</div> <div>VERIFIED</div> <div>NON-BILLABLE</div> </div>							

September 2021 - 13 (v) - 89 (h)							WEEK ▾
SUN 12	MON 13	TUE 14	WED 15	THU 16	FRI 17	SAT 18	
<div>Visits - 2 Hours - 19</div> <div>Lucy Magee 00:00-07:00 LVN-TXCH-S</div> <div>Lucy Magee 07:00-19:00 LVN-TXCH-S</div>	<div>+ Visits - 2 Hours - 17</div> <div>Lucy Magee 07:00-19:00 RN-TXCH-S</div> <div>Lucy Magee 19:00-00:00 LVN-TXCH-S</div>	<div>+ Visits - 1 Hours - 8</div> <div>Lucy Magee 00:00-07:00 LVN-TXCH-S</div> <div>Lucy Magee 07:00-08:00 Unbilled Segment</div>	<div>+ Visits - 1 Hours - 12</div> <div>Lucy Magee 07:00-19:00 RN-TXCH-S</div>	<div>+ Visits - 3 Hours - 7</div> <div>Lucy Magee 07:00-08:00 Unbilled Segment</div> <div>Johnny Jones 08:00-09:00 OT-TXCH-Visit</div> <div>Lucy Magee 19:00-00:00 LVN-TXCH-S</div>	<div>+ Visits - 2 Hours - 13</div> <div>Lucy Magee 00:00-07:00 LVN-TXCH-S</div> <div>Ted Lasso 07:00-08:00 SLP-TCHP-Visit</div> <div>Lucy Magee 19:00-00:00 LVN-TXCH-S</div>	<div>+ Visits - 2 Hours - 13</div> <div>Lucy Magee 00:00-07:00 LVN-TXCH-S</div> <div>Johnny Jones 10:00-11:00 OT-TXCH-Visit</div> <div>Lucy Magee 19:00-00:00 LVN-TXCH-S</div>	
<div> <div>OPEN</div> <div>SCHEDULED</div> <div>WORKING</div> <div>SUBMITTED</div> <div>MISSED</div> <div>NON-CLINICAL</div> <div>VERIFIED</div> <div>NON-BILLABLE</div> </div>							

Calendar Overview: Icon & Color Key

 OPEN	Scheduled shift without employee assigned.	 MISSED	Shift has been marked as missed with missed reason.	 Link indicates an overnight shift.
 SCHEDULED	Scheduled shift with employee assigned.	 NON-CLINICAL	Shift will not have clinical data tied to it.	 Advanced Filter
 WORKING	Shift has been clocked into and is not yet submitted.	 VERIFIED	Shift has verified for payroll and/or billing.	 Select Date
 SUBMITTED	Shift is completed and has been submitted.	 NON-BILLABLE	Shift is not billable and will not have service codes associated with it.	 Multi-Select Options
				 Action Options

Calendar Overview: Action & Select Options

Multi-Select Options

Quickly select shifts based on status or deselect all. Action options may vary based on selections.

Select All

Deselect All

All Scheduled

All Submitted

All Late

All Missed Visit Note

All Open

All Verified

Action Options

Selected shift(s) will have these action options. Options may vary based on shift status.

Find Assignment By ID

Clone

Delete

Edit

Mark as Missed

Print

Reset

Send Text

Verify

Find Assignment by ID: enter visit id to go straight to shift in calendar

Delete: remove shift from calendar

Edit: make mass edit(s) to shifts

Print: open print view of scheduled shifts; must be filtered to specific patient and/or employee

Reset: reset shift to make it available in app for next 24 hours

Send Text: text details of open shift to employees

See calendar feature slides for more details regarding Clone, Mark as missed, and Verify.

Shift: Schedule New

Navigate to the calendar by selecting Calendar in the menu options.

Click the blank space on the date on which a shift needs to be added, allowing a event scheduling box to show.

The screenshot displays the 'Calendar' application interface. On the left side, there is a form for adding a new visit. The form includes fields for 'Date' (set to 09/05/2021), 'Client' (set to All), 'Show' (set to Open), and 'Employee' (set to All). Below these fields are icons for clock, dollar sign, calendar, and location pin, followed by a '+ NEW SEGMENT' button. At the bottom of the form is a blue 'SAVE' button. On the right side, there is a calendar grid for September 2021. The grid shows days from Sunday (5) to Saturday (11). The title of the calendar is 'September 2021 - 0 (v) - 0 (h)'. Navigation controls include 'TODAY', a calendar icon, and arrows for previous and next days, along with a 'WEEK' dropdown menu.

SUN	MON	TUE	WED	THU	FRI	SAT
5	6	7	8	9	10	11

Add visit details in the event scheduling box on left hand side of calendar.

Shift: Visit Details

Fill in the shift details from top to bottom by making the following selections & click Save.

Client: Patient name

Form Type: Shift type being scheduled

Employee: Pick list will only populate options that align with patient's skills and the selected form type

Service: Defaults the billing code based in employee and shift type, can be changed

VISIT

CLIENT

AUTH(S)

New

Date

09/06/2021

Client

Lucy Magee

×

Select Form

PDN Shift

×

Employee

Open

🕒

\$

📅

📧

Service

LVN-TXCH-S * 84 of 140

×

SAVE

Use the time pickers to select shift times and **+New Segment** to add additional segments.

Start Time

End Time

07 00

18 00

+ NEW SEGMENT

- 🕒 Edit Segment: Add segments to apply different service codes to each segment
- \$ Edit Payroll: Pay rate will default to the highest acuity pay rate based on patient skill and shift type, can be changed
- 📅 Repeat: Daily, Weekly, Monthly, and Select Day repeat options are available
- 📧 Send Email: Send an email about shift

Shift: Access Options

Once the shift is saved, **Action Options** will become available.


Mark as Complete


Mark As Missed

Remove

Verify

History (Updated by: Michelle Hynoa)

 SAVE

 ACTIONS


Mark as Complete: purpose of feature is to mark a shift as complete for billing and payroll purposes; shift must be in scheduled status


Mark as Missed: mark a shift as missed with a missed visit reason and optional note

Remove: delete shift from calendar; only shifts in scheduled and working status can be removed

Verify: verify shifts for both payroll and billing

History: audit history shows changes made to shift


 **EVV:** geo and timestamp details; fields for EVV reason codes & EVV visit edit notes


 **Note:** add assignment specific note; intended to be used for schedulers to leave notes for one another about filling the shift, etc.
sort assignment notes by employee or date


Shift: Client, Employee, & Auth Details

View client & employee contact information and details, such as skills and pay rates assigned. See client authorization details including weekly used hours or visits and total authorized. Select **Visit, Client, Auth, or Employee** to change view.

VISIT CLIENT AUTH(S) EMPLOYEE

**Lucy Magee**
DOB: 11/10/2016 | Female |
Weight: 100

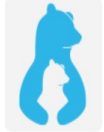
 (214) 291-0010


 123 Cubhub Fort Worth, TX 76116


Skills
G-Button, Trach, Vent, Pediatric


Sweet little girl who lives at home in Princeton with mom and dad. Mom works, so texting is the preferred method of contact. Gate Code: 1234

VISIT CLIENT AUTH(S) EMPLOYEE

**Daniel Mann**
RN
Male | 48 Hours

 (972) 798-6059

 321 Hubcub Fort Worth, TX 76116


 dan@fake.com

Teams
Demo


Pay Rates

Description	Rate
Assessment	\$0.00
GB-hourly	\$30.00

VISIT CLIENT AUTH(S)


Texas Childrens SK (PDN - 909090) 
Authorized (10/6/2020-10/6/2021)

	Used	Authorized
Weekly	36	140
Total	5502.5	7280

Texas Childrens SK Respite (PDN - Respite) 
Authorized (1/1/2021-12/31/2021)

	Used	Authorized
Weekly	0	18
Total	184	5000

 Add a note to client or employee chart.

 Access client or employee profile.

Open patient authorization using edit icon beside authorization.

Shift: Repeat Options 📅

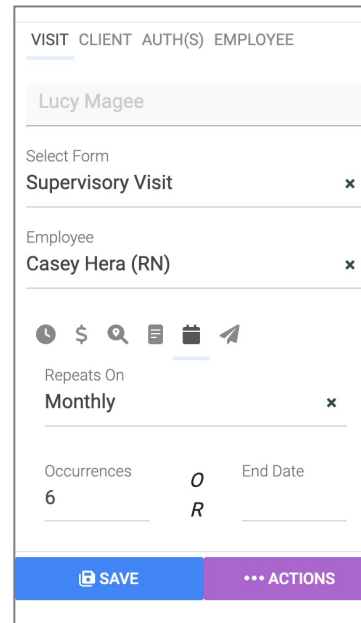
Use repeat options to quickly place a repeating shift on subsequent calendar dates. Select the **calendar icon** to open repeat options.

Daily: repeats shift daily based on occurrences or end date

Weekly: repeats shift each month based on occurrences or end date

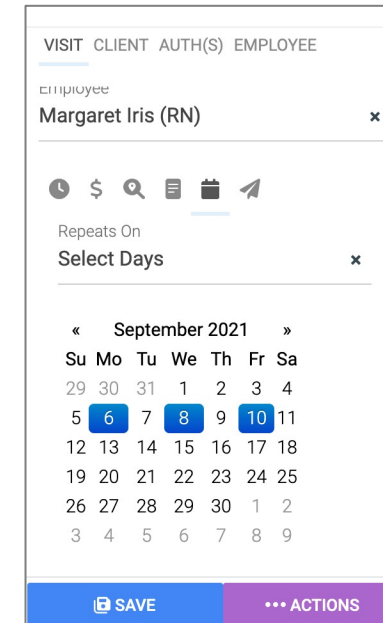
Monthly: repeats shift each month based on occurrences or end date

Select Days: select days in calendar on which to place a shift



The screenshot shows a form with tabs: VISIT, CLIENT, AUTH(S), and EMPLOYEE. The 'EMPLOYEE' tab is selected, showing 'Lucy Magee'. Below, 'Select Form' is set to 'Supervisory Visit'. 'Employee' is set to 'Casey Hera (RN)'. A row of icons (clock, dollar sign, magnifying glass, list, calendar, and arrow) is present, with the calendar icon highlighted. Below the icons, 'Repeats On' is set to 'Monthly'. At the bottom, 'Occurrences' is set to '6' and 'End Date' is set to 'O R'. A blue 'SAVE' button and a purple 'ACTIONS' button are at the bottom.

In this example, the nurse is scheduled for a monthly sup visit with the patient over the next six months.



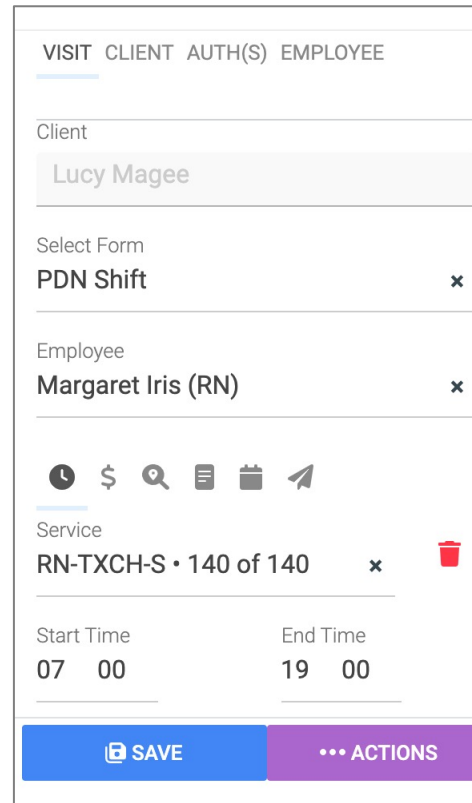
The screenshot shows the same form as the previous one, but with the 'Repeats On' dropdown set to 'Select Days'. Below this, a calendar for 'September 2021' is displayed. The calendar shows days from 1 to 30, with the 6th, 8th, and 10th highlighted in blue. A blue 'SAVE' button and a purple 'ACTIONS' button are at the bottom.

Select days is a great way to plan a week's repeated shifts prior to using the Clone feature.

Shift: Billing Segments

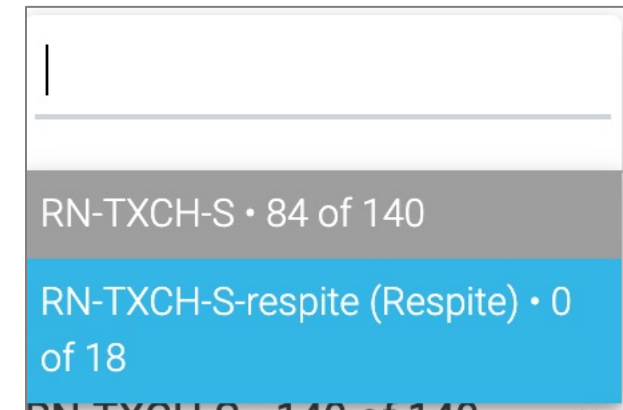
A shift's service details will default based on the type of shift and the employee's licensing. Select the **clock icon** to access service details.

- The payer set to calendar default in a patient's Financial will pull to the shift's service details.
- The service code(s) available will be dependent on those selected in a patient's authorization.
- The service code will default based on the employee's discipline and the shift type.



The screenshot shows a form titled "Shift: Billing Segments" with a clock icon. The form has tabs for VISIT, CLIENT, AUTH(S), and EMPLOYEE. The CLIENT tab is selected, showing "Client: Lucy Magee". Below this is "Select Form: PDN Shift" with a close button. The EMPLOYEE tab is selected, showing "Employee: Margaret Iris (RN)" with a close button. Below this is a "Service" section with a clock icon, a dollar sign, a magnifying glass, a list icon, a calendar icon, and a share icon. The "Service" section shows "RN-TXCH-S • 140 of 140" with a close button and a trash icon. Below this are "Start Time: 07 00" and "End Time: 19 00". At the bottom are "SAVE" and "ACTIONS" buttons.

All other applicable service codes for a shift will show in the drop down options, and a different option can be selected, if needed.



The screenshot shows a dropdown menu with the following options: "RN-TXCH-S • 84 of 140" (highlighted in grey), "RN-TXCH-S-respite (Respite) • 0 of 18" (highlighted in blue), and "RN-TXCH-S • 140 of 140" (partially visible at the bottom).

Shift: Payroll \$

An assignments pay rate will default to the highest acuity pay rate assigned to clinician based on the patient's skills. Select the **dollar sign** to access payroll details.

VISIT

CLIENT

AUTH(S)

EMPLOYEE

Employee

Margaret Iris (RN) x

🕒

\$

🔍

☰

📅

📌

Pay Rate

Vent-Hourly x

Override Pay Rate

Mileage

☐ Exclude from Payroll

☐ Non-Clinical

💾 SAVE

⋮ ACTIONS

Override Pay Rate: enter a pay rate amount to override an employee's designated rate

Mileage: mileage will populate based on what is entered when a employee submits shift or manually enter mileage

Calendar Feature: Mark as Missed

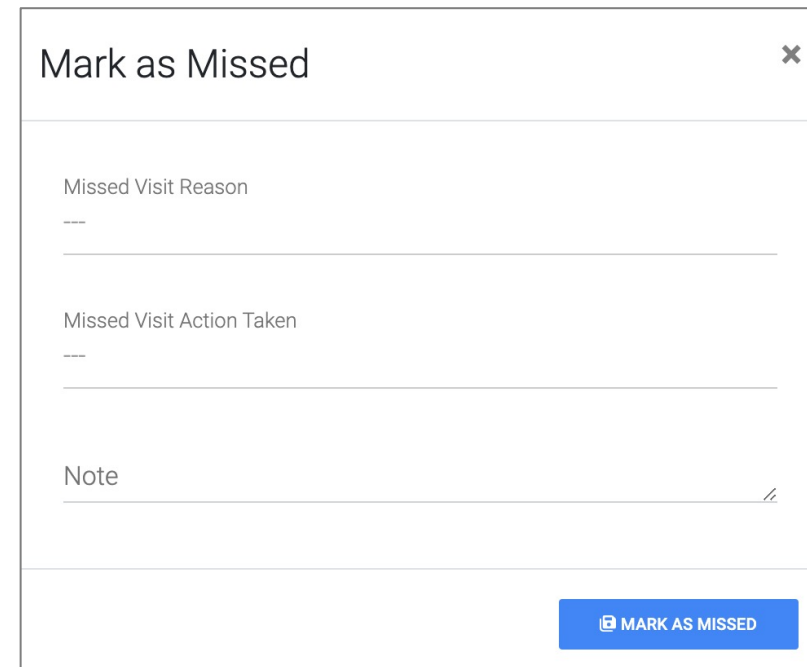
Mark a shift as missed to track missed visit reasons and actions. Use the Missed Shift Report to track missed shifts.

Calendar > Select shift(s) > Action ellipsis > Mark as Missed

Missed Visit Reason: required, choose from selections; some EVV providers require provider specific reasons

Missed Visit Action Taken: optional, choose from selections; some EVV providers require provider specific missed visit actions

Note: optional note to include details regarding missed shift



The screenshot shows a modal dialog box titled "Mark as Missed" with a close button (X) in the top right corner. The dialog contains three input fields: "Missed Visit Reason" (required), "Missed Visit Action Taken" (optional), and "Note" (optional). Each field has a dropdown arrow on the right. At the bottom right of the dialog is a blue button labeled "MARK AS MISSED" with a small icon to its left.

Calendar Feature: Clone

Clone a client's calendar week forward over subsequent weeks.

Calendar> Filter by patient> Action ellipsis> Clone> Select weeks> Clone

Clone Section

Select Week to Clone

Clone From Week of

Through Week of

CLONE

Select Week to Clone
mm/dd/yyyy

« September 2021 »						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Select week to clone by selecting the Sunday of that week.

Clone From Week of
mm/dd/yyyy

« September 2021 »						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Select week you first want to clone the week to by selecting the Sunday of that week.

Through Week of
mm/dd/yyyy

« September 2021 »						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Select the last week you want to clone the week through by selecting the Sunday of that week.

Calendar FAQs

Q. Why don't I see a clinician I need in the shift's pick list?

A. It's probably because the skills of the patient and the service code being used don't match the skills of the clinician. For nursing, it is usually because the patient has a skill, such as "Trach" that the clinician you want to schedule doesn't have.

Q. Why can't I see the schedule shifts in my calendar view?

A. Be sure to check your advanced filters, to confirm you aren't unintentionally filter what is showing for you.

Q. How do I verify a shift?

A. Select the shift and click Verify in the action options, and see our Billing guide for more verification details.