

Telephony Training Packet

This packet contains three documents to help your office staff and caregivers learn about WellSky Personal Care's Telephony System and ensure that everyone in your agency is ready to use Telephony on your launch date.

1. Telephony Training Guide

The best way to familiarize your caregivers with Telephony is to hold an in-house training. This document provides an overview of Telephony for WellSky Personal Care users in your office. Print it and pass it out to your office staff for them to use as a reference when you go live and use it as a guide for holding a caregiver training.



2. Telephony Handout

This is a handout with instructions and tips for your caregivers to take home after the in-house training. Before printing out and distributing this to your caregivers, enter your agency's Telephony number and Go-Live date, and check off the appropriate boxes indicating which phones are permissible to clock-in/out from and who hears the comments they leave over Telephony when clocking out. Not holding an in-office training? This is a great resource to email or mail to caregivers to help prepare them for your launch.



3. Telephony Setup Checklist

There's a lot to do in order to prepare for a smooth Telephony launch! This checklist reviews key items that should be completed before your launch date. Use this checklist to make sure that you've completed each step necessary to launch Telephony, and as a final review to make sure that you are ready for launch.



Have any additional questions about Telephony? You can learn more about WellSky Personal Care's Telephony in our online Community. To access our Community, hover your mouse over the 'Need Help?' tab in the upper right-hand corner of your WellSky Personal Care site and click on 'Consult our Community.'

Thank you for choosing WellSky Personal Care!



What is Telephony?

Telephony is the system your caregivers will use to clock in and out of their shifts. Through Telephony, caregivers can listen to their tasks for shifts, record any mileage accrued during the shift, and record comments. It is important that your caregivers are well trained in the use of Telephony before your go-live date with WellSky Personal Care to ensure a smooth launch day.

What do caregivers need to know before you go-live?

- 1. What phone number do caregivers call to clock in and out?** Your agency has a unique phone number that caregivers will always call to clock in and out. *This number can be found in the top right corner of your Telephony Logs in WellSky Personal Care.*
***TIP:** WellSky Personal Care's Caregiver Name Tags each print with your Telephony number on the back.
- 2. What phone can caregivers use to clock in and out?** You can configure your Telephony settings in the Agency Settings portion of your WellSky Personal Care site under the section titled *Clock-ins, Clock-outs, and Alerts*. Many agencies restrict caregivers to call from the client's home phone only, but there may be circumstances where your agency has deemed it appropriate to allow caregivers to use their personal mobile phones.
- 3. How early can a caregiver clock in for a shift?** This setting can also be configured in your *Clock-ins, Clock-outs, and Alerts* section. If a caregiver attempts to clock in before the permitted time, they will be told that there is not an available shift.
- 4. Who hears the comments caregivers leave on Telephony?** Towards the end of the call, Telephony will prompt caregivers to press 8 if they would like to leave a general comment or change in condition. These comments are always logged in WellSky Personal Care for administrators to listen to. However, agencies can also allow for the next caregiver and/or the client's family members to hear these comments. These comments are a great way to ensure that everyone is well informed of the client's condition and that the appropriate care is provided. You can configure who can listen to caregiver comments left via Telephony in the *Clock-ins, Clock-outs, and Alerts* section of your site's Agency Settings.

What does Telephony sound like?

Play Video at:

<https://knowledge.wellsky.com/knowledge/personalcare/Personal%20Care%20University/Videos/Video%20Caregiver%20Intro%20to%20Telephony.htm>

***TIP:** For additional training, set up a dummy shift to clock in and clock out during this training.



Tips on Avoiding Common Clock-in and out Mistakes

Share these three tips with your caregivers to help answer common Telephony questions and avoid mistakes when first using WellSky Personal Care's Telephony.

Tip #1: Be sure to clock in within the clock-in window.

If a caregiver calls to clock in and the system says there are no available shifts for that client, have the caregivers ask themselves the following questions:

- Am I clocking in too early? If yes, wait the appropriate number of minutes and then call back.
- Am I clocking in from the correct phone? (*Are the caregivers allowed to use their mobile phones or do they have to use the client's home phone?*)
- If the caregiver is clocking in from the correct phone in the permissible time window, they should call the office to verify there is indeed a scheduled shift. The office should verify that the phone number the caregiver is calling from is correctly entered into WellSky Personal Care so Telephony can recognize it.

Tip #2: Make sure that you clock in from the right phone.

If a caregiver attempts to clock in or out from an unauthorized phone, Telephony will inform them that the number they are calling from is not a recognized number.

- If they are calling from their mobile phone – is this permitted?
- If they are calling from the client's phone and hear this message, they should call the office using that same phone so the office can confirm that the number is saved correctly.

Tip #3: Be sure to wait for confirmation that you have been successfully clocked out.

Telephony will not clock out your caregivers unless they wait to hear the system confirm they have successfully clocked out. Therefore, if they hang up immediately after pressing 9, their shifts will still appear as yellow, indicating the shift is still in progress. Let them know they must wait for, "*You have been clocked out of the home of [client's name]. Goodbye!*" before hanging up the phone.



Telephony Handout

Insert your agency logo
in this table cell

What is Telephony?

Telephony is your new time-tracking system. It allows you to clock in and out of your shifts over the phone.

Date Telephony starts:	Clock in using:
Number to call:	<input type="checkbox"/> Client's home phone <input type="checkbox"/> My cell phone <input type="checkbox"/> Any phone <input type="checkbox"/> Internet (using Caregiver Portal)

If you try to clock in from a phone that is not permitted, Telephony will tell you they do not recognize the number and you will not be clocked in.

Clock in no more than minutes before your shift.

If you try to clock in earlier than that, Telephony will say there is not an available shift for you at this time.

Clocking In:

Step 1: Call Telephony when you arrive at the client's home. If there is more than one shift for the day, you will be asked to select the appropriate shift.

For example:

"We found several available shifts for Joe Smith. Press 1 if you are Jennifer Caregiver and are clocking out of the X shift. Press 2 if you are Ronald Caregiver and are clocking in for the Y shift."

Step 2: Upon clocking in you will hear the list of your tasks – listen and then hang up.

Clocking Out:

Step 1: When your shift is complete, call Telephony to be asked to update the status of tasks assigned to you. Press 1 to mark a task as complete, 2 for incomplete. If you mark a task as incomplete, you will be asked to record a reason.

Step 2: If necessary, press 8 to leave a general comment or change in condition. Once all tasks have been updated you will have the option to press 9 to clock out.



Telephony Handout (cont.)

Insert your agency logo
in this table cell

Important things to remember:

Clock in on time:

If Telephony says there are no available shifts for you at this time, look at what time it is and call back when you are in the permitted time window.

Check the phone you are allowed to clock in from:

If Telephony says you are calling from a non-recognized number, make sure you are using the correct phone. For example, if you are calling from your cell phone, did your manager say this was allowed?

Listen to your tasks:

After you have successfully clocked in, Telephony will read you the tasks you must complete during the shift. When you call back to clock out, you are required to report if each task was completed or not.

Clock out correctly:

You need to hear *“You have been clocked out of the home of [client’s name]. Goodbye!”* before hanging up the phone.



Telephony Setup Checklist

To ensure you and your staff are ready to use Telephony on your launch date, use this checklist to verify you have completed all the necessary steps:

Settings	<input type="checkbox"/> Clock-ins/Clock-outs and Alerts are properly set up <input type="checkbox"/> Family room options are checked <input type="checkbox"/> Ad-Hoc Shifts are checked <input type="checkbox"/> Rounding is checked
For Office Staff	<input type="checkbox"/> Office Staff know how to assign tasks <input type="checkbox"/> Office Staff know where the Telephony log is <input type="checkbox"/> Office Staff know how to trouble shoot if a caregiver can't clock in <input type="checkbox"/> Office Staff know how to change Telephony Settings <input type="checkbox"/> Office Staff have read "Getting Started with Telephony" Article: <ul style="list-style-type: none"> • https://knowledge.wellsky.com/knowledge/personalcare/Telephony%20Alerts%20Messaging/Telephony/Getting%20Started%20with%20Telephony.htm?community=ClearCare
For Caregivers	<input type="checkbox"/> Caregivers know your agency's Telephony Number <input type="checkbox"/> Caregivers know the day to start using Telephony (your go-live date) <input type="checkbox"/> Caregivers know which phone number they are allowed to clock in/out from <ul style="list-style-type: none"> • Clients' phones, mobile phones, web portal and/or any phone <input type="checkbox"/> Caregivers know how early they are able to clock in <input type="checkbox"/> Caregivers know who is hearing their comments left on Telephony <ul style="list-style-type: none"> • Agency admins, family members and/or the next Caregiver <input type="checkbox"/> Caregivers know when they should hang up after clocking out

Completed By: _____