

Mandatory Forms User Guide

October 2023



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Feature overview

Mandatory Forms is a feature that complements an agency's core visit completion workflow, addressing the requirement for forms at the upstream of the visit verification process. Simply put, Mandatory Forms lets agencies mandate that a specific form must be completed for a specific service.

Main benefits of this feature include:

- Helps agencies configure forms as "Required" or "Other", at the patient service, visit, or care plan intervention level
- Helps care managers clearly identify mandatory care plan interventions
- Eliminates compliance risks with more timely mandatory form submission, and less administrative follow-ups
- Guides care workers in real-time to submit Mandatory Forms
- Validation mechanism which ensures that all forms required are submitted and completed prior to the care worker clocking out of a visit
- Offers greater visibility to each patient's care plan, therefore offering better control over necessary forms which leads to better care
- Ability to individually or bulk override the need to submit a required form on a visit using a comment, which is similar to our current behaviour for care plan interventions on visits
- Permissions for certain tasks associated to the use of Mandatory Forms can be assigned to the appropriate roles at the agency

Please note that as we continue to offer improvements to this feature, this user guide may be updated from time to time.



Configuring Mandatory Forms on a Service

Getting Started

Please note that you must turn on the "Mandatory Forms" feature flag in your settings.

On the client service creation modal, use the "Forms – Required" multi-select to attach Mandatory Forms onto a visit. The form(s) will be brought over to their respective categories on visit creation for this service. For all other forms that do not require a submission for clock out, attach them as "Form – Other".

C Search clien	ts, employees, contacts								AlaysCare Health	11.28 AM America/Toro	nto 🗸	Switch to AlayaCare He	althy ~	RC 🖂
A Services					Edit Service		>	<						
√ Active ⊙					Service Details		Visit Details							
Client 0	Service 0	Alayacare Id a	Budget ID	Episode # 0 Department	Service Name *		Activity Codes		tus Status Effective Date	Workflow	BRN	Service Priority Rating	0 Req. 1	
Gemma Ryan	Nursing	AC000000010			Nursing Start Date Projected End Date	0	+ Form - Required		ive 06-15-2016	Needs Coordination J	777007		02-14-:	Edit Service
Valerie Chow	Narsing	AC000000013			02-16-2018 02-24-2018	0	Form - Other		ive 03-22-2023	Needs Scheduling 🧳				Edit Service
Gayatri Uttle	Nursing	AC000000016			Single source	~	Wigana Lare Prov Sneet V2 Skills Needed		tve	1				Edit Service
Emer Conkle	Community Health War	AC000000022			MOHLTC Funder filtered by service	0	Service Instructions		ive	Needs Coordination				Edit Service
Entinhan Severance	Nursing	AC00000028			Service Code * General Service Service	0	Notes		ive .	1				Edit Service
Hathor Kroeger	Nursing	AC00000034			Primary Employee Gregory Petit			8	ive	Needs Coordination y				Edit Service
Loch Schantz	Nursing	AC00000037			Add to Associated Employees				ive .	1				Edit Service
Eros Comstock	ADS	AC000000043			Client Referral Source test client referral source	0			ive 04-03-2023	1				Edit Service
Share Restroe	Nursing	AC000000046			Client Referred By test referral	0			ive	1				Edit Service
Japera Hickle	Nursing	AC000000049			Peanuts	~			ive .	1				Edit Service
Viola Einnerty	Nursing	AC000000055			Select an Option	~			ive	1				Edit Service
Imgard Odum	Nursing	AC000000061			Testing				ive	1				Edit Service
Gautama <u>Deguzman</u>	Nursing	AC00000067			Form Context 1				ive	1				Edit Service
Sal Almeida	Foot Care	AC000000070			Private Care Package Status				ive.	1				Edit Service
Renny Visser	Nursing				Select an Option	~				1				Edit Service

Please note that each form can only exist in one of the available categories. Specifically, **a form cannot be both "Required" and "Other"**. All forms that were previously attached to the service *before Mandatory Forms went live* will fall under the "Forms – Other" category.



Configuring Mandatory Forms on Care Plan interventions

Forms attached via care plan interventions, service, and visit now all fall under the same forms list for the visit.

1. Define the default behaviour for form-linked interventions.

\leftarrow \rightarrow C \triangleq theforcemonkeys.dev.alayacare.ca/#/systemetry \sim	m-settings/system		Q	ů 🖈 🍯	0	* 0		:
		AlayaCare Healthy 11:50 AM America/Toronto	Switch to	AlayaCare Healt	ny ~	RC		
C2 Datibard	Default Comment For Service Tasks Not Completed On Clock-Out							
ලි Clients දිදුදී Employees	Ac Standard Form Template Header	Visit scheduled time Visit clocked time Visit adjusted/verified time						
مع Accounting	Default to Archiving Medication When Discontinuing	On					~	
Schedules	Threshold For Marking Medication Administrations As Early, Late Or Missed (In Minutes)	60						
O Settings	Default Vitals Unit	Imperial					~	
	Default Behavior of Forms On Care Plan Interventions	✓ Optional Required Required when Intervention is required				SA	VE	

Then, select the appropriate default for form linked interventions for your agency:

- **Other** by default, all forms linked to visits via care plan interventions will fall under the "Other Forms" forms list.
- **Required** by default, all forms linked to visits via care plan interventions will fall under the "Mandatory Forms" forms list.
- Required when intervention is required by default, forms linked to visits via care plan
 interventions will follow the requirement setting of the intervention itself. I.e., when the
 individual intervention has the "Required for visit completion" setting enabled, the
 linked form will fall under the "Mandatory Forms" list for the visit. If the "Required for
 visit completion" setting on the intervention is disabled, then the linked form will fall
 under the "Other forms" list for the visit.



2. Configure patient care plan interventions.

Klaya	Care Q Search clients, e	mployees, contacts	Add ADLs					×	Switch to A	layaCare Heal	thy 🗸 🖡	\C ⊠ (÷
Kristyad Custoser Citores Citores Kresering Extendes Extendes	Care Care And Care An	ry America Plassas Scheduling Care Status C Diagnoses Goals	Add AbLs Summary Name* Perform fails risk assessment Description Type * Noto Set Department Description Department Description Department Description Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Catel Cat	Tag(s) Tag(s) Eservice(s) URL URL V V when Intervention in Regulard for	Frequency Start Date * MM-DD-YYY Prequency Typ Not Set	r *****	End Date MM-DD-YYYY			() Copy	tty Care	RC 20 (
							Cancel	Save					

In the above example, the default setting for form linked interventions is set as "Required when intervention is required for visit completion". Since the "Required for visit completion" setting for the intervention is unchecked, this "Falls assessment" form will fall under the "Other forms" list on a visit.

AlayaC	Care Q Search clients, er	mployees, contacts	Add ADLs						×	Switch to AlayaCare	Healthy V RC 🖂 [->
R	Gemma Ryan A health care agency	y, America/Nassau	Summary Name *			Frequency		End Date			AlayaCare ID: AC00000008
$\boldsymbol{\boldsymbol{\omega}}$	Overview Client Info	Scheduling Care I	Perform falls risk assessment		Θ	MM-DD-YYYY	曲	MM-DD-YYYY	曲		
Dashboard			Description			Francisco Tomo *					
	Assessments	Status				Frequency Type *				🖶 🔳 Archive 📗 Cog	oy 🖉 Edit 🕞 Publish
오 Clients	Services					Not set	~				From 02-01-2023
63	Care Plans		Type *	Tag(s)	11						
ି ପ୍ରି Employees	Client Forms	Diagnoses	Not Set ~	+							Bulk actions
ĸ	Document Approvals	g	Related Goal (s)								
Accounting	Associated Employees	Goals	Department	Service(s)							Bulk actions +
Schedules	Blocked Employees		Not Set	+							
	Required Care Skills	_	Capture Time Spent on ADLs	~							
O Settings	Care Provider Notes		Include in 485]				
Gettings	Vitals Configuration		External Link								
			Label	URL							
	Attachments										
			Link to AlayaCare Module								
			Form V								
			Specify Form *				•				
			Falls assessment		٢						
			Form Requirements *								
			Required		~						
								Cancel	Save		

If necessary, the default form requirement behaviour can be overridden per intervention. In the example shown above, the "Falls assessment" form can be modified to "Required", so that this form can fall under the "Mandatory Forms" list, even if the intervention is not required for visit completion.



Create a Visit

KlayaC	are Search clients, employees, contacts	New Client Visit			×	Switch to Alay	raCare Healthy → RC ⊠ [→
2	Phone (Business Cell):					rd Total	1
	Phone (Personal Cell):					20.001	h
\square	Email: Address:	Visit Details		Scheduling		8.00 b	
Dashboard		Client *		Start Time *	End Time *	0.0011	
_		Gemma Ryan		02-22-2023 02.14 PM	02-22-2023 03.14 PM		
[요] Clients	60 min 🗸 🛛 Week 🗸	Client Services *		Use Service Duration (60 min) and Care	time (60 min)	🖨 Print	+ Add Visit(s) 😩 Care Team
	Mon 02-20	Nursing	Chosen	Break (in Minutes)		02-25	Sun 02-26
² 2 ²	all-day	PSW	() Choose	0			
Employees	12:00 AM Jasmine Cranchuk General Service	Physio SOC	() Choose	Create as a recurrence		Jeneral Service	Jasmine Cranchuk General Service
\bowtie	01:00 AM 02:00 AM	РТ	() Choose				
Accounting	03:00 AM	Infusion	(Choose	Interventions			
ra I	04:00 AM 05:00 AM						
Schedules	06:00 AM Kathy Robles SC5	Service Code *		-			Kathy Robles SC5
~	07:00 AM 08:00 AM	General Service		There are no matching Interventions for the	e selected period.		
(c)>	09:00 AM	Assign to Facility				and the second se	
Settings	10:00 AM	Type to assign facility	🕅 Find Facility				
	12:00 PM	Assign to Employee					
	01:00 PM	Gregory Petit	🚢 Find Employee				
	03:00 PM Lesieanne Blakeley General Service						
	04:00 PM Gregory Petit General Service	Activity Code	Optional Forms				
	05:00 PM	Type to add activity codes	Type to add forms				
	07:00 PM		Wound Care Flow Sheet v2 ×				
	09:00 PM	Skills	Required Forms				
	10:00 PM	Type to add skills	Type to add forms				
	1.00 PW	Nursing Licenses ×	Systems Assessment ×				
		Service Instructions					
		Tage					
		+					
					Cancel OK		

Other and Mandatory Forms can also be modified per visit.

Clock into a Visit

dit Visit				×
1 Information	Interventions	+ Add Form	IS 0/2	+ Add
🖉 Edit	0/0			
⊄ Offer	No data found.	Requir	red * Optional	
Æ Service Tasks		System	is Assessment *	Fill in V
Stransportation	Visit Signature			
🛱 View Notes	Client Signature			
 Time Approval 		Goals	5 0/0	
Ø Premiums		No data t	found.	
Invoice Labels				
Accounting				

			K
Edit Visit			×
Information Edit	Interventions	+ Add Forms 0/2	+ Add
✔ Offer	No data found.	Required * Optional	
 Æ Service Tasks A Transportation 	Visit Signature	Wound Care Flow Sheet v	2 Fill in V
 □ View Notes ✓ Time Approval 	Client Signature	Goals 0/0	
2 Premiums		No data found.	
 Invoice Labels Accounting 			

Forms are now sorted under the "Required" and "Other" categories. Click on each tab to toggle between the form lists.

edit Visit	Service	Tasks Incomplete	×	×	AlayaCare I	Error × Failed to clock out of 1 visit(s). Fill in or override required forms to clock out of the visit.
Information Edit	(i) At nor	least one of your mandatory service tasks is i d is missing a comment. Would you like to cor w?	ncomplete nplete it	S Hold 🕞 Copy 🕓 Clock Out	0	+ Add Visit(e)
문 Service Tasks		Cancel Complete S	ervice Tasks	Sandrine Fortin-Charron PO test		
00 View Notes	Cancelled		PED			
✓ Time Approval	Activity Codes	01 - Assessment	Hours Bill Code	1.6667HR		
0 Premiums	On Hold Status		Pay Code Overtime	Scenario 6		
0 Invoice Labels	Reason Date	02-22-2023		View revisions		
ut Accounting	Time Break Master Funding Units Used Funding Locked Closed	04:10 PM - 05:50 PM - Not Funded No				
		03:36 PM -	(Open Shift)			

dit Visit		×
Information	Interventions	+ Add Forms 0/2 + Add
🖉 Edit	0/0	
E Service Tasks	No data found.	Required * Optional
A Transportation		Forms below need to be filled in for this visit,
D View Notes	Visit Signature	
 Time Approval 	Client Signature	Systems Assessment * Fill in V
Premiums		▲ Filling in this form is required for this visit.
Invoice Labels		
Accounting		Goals 0/0
		No data found

Mandatory Forms must be submitted for a care worker to successfully clock out. If the user has permission to override the required form with a comment, they will be able to clock out, once all Mandatory Forms have been submitted, or overridden.

Note that if the user has the permission to edit the forms on the visit (Settings> Roles and Permissions> Accounting folder> "Edit Report Templates"), they can also define which forms are required even if they do not have the ability to override the form with a comment. Please review each of these permissions carefully.

Information	Interventions	+ Add	Forms 1/2	+ Add
2 Edit	0/0			
📢 Offer	No data found.		Required * Optional	
爰 Service Tasks			Systems Assessment *	Fill in
Transportation	Visit Signature		DRAFT	View Definition
ා View Notes	Client Signature			Override With a Commen
 Time Approval 			Goals 0/0	
Premiums			No data found.	bles S
2 Invoice Labels				



Edit Visit	Override Required Form	×	Alayacare Heatiny 0249 PM	Cancellee
f Information	Are you sure you want to override this request of the filled to the filled to be filled to	uired form? o clock out /2	+ Add	
	Override Reason Patient refused service today.	Optional		Sat
E Service Tasks		ssment *	Fill in 🗸	Cranchuk Gr
 View Notes Time Approval 	c	Cancel Save		
Premiums		No data found.		bles SC5
C Invoice Labels				
				4

Edit Visit			×
Information Edit Offer	Interventions + Add 0/0 No data found.	Forms 1/2 Required * Optional	+ Add
 Service Tasks Transportation View Notes 	Visit Signature 0/1 Client Signature	Systems Assessment * DRAFT OVERRIDDEN 2023-02-22 14:49, Administrator Patient refused service today	Fill in \vee
 Time Approval Premiums Invoice Labels 		Goals 0/0 No data found.	
II Accounting			

Permission (ACL) required can be found by going to Settings> Roles and Permissions> Clinical folder> "Override Mandatory Forms on visits with a comment".

dit Visit		:
Information	Interventions Edit all completed	Forms 0/2
C Edit	0/0	
📢 Offer	No data found.	Required * Optional
₩ Service Tasks		Systems Assessment *
A Transportation	Visit Signature	OVERRIDDEN 2023-02-21 16:16, Administrator
D View Notes	Client Signature *	Please verify: comment added automatically.
 Time Approval 		
Premiums		Goals 0/0
Invoice Labels		No data found.

If the user has the necessary permission (ACL) enabled, an automatic comment can be applied to all incomplete Mandatory Forms by clocking out of the visit. This can be checked off by navigating to Settings> Roles and Permissions> Clinical folder> "Clock out of a visit without completing all required service tasks".

ventage v
~]
• · · ·]
siotherapy
sit scheduled time
sit clocked time
sit adjusted/verified time
~
erial
erial ~

You may now configure the automatic comment as needed.



Transition to Mandatory Forms

As mentioned earlier, when Mandatory Forms is enabled in your live environment, any forms that were previously attached to client services and visits will move to the "Other" forms category.

To implement Mandatory Forms, consider the following three options.

Option 1: Progressively Update Client Services and Visits

If your agency is already attaching forms at the client service and visit level, the relevant forms for all existing services can be moved from "Other" to "Required" progressively. These updates can happen during routine updates to the client service, for example, during a 60-day recertification.

• For net new services and visits, attach the relevant forms to the "Required" form category.

Edit Service			>	×
Service Details			Visit Details	
Service Code*			Activity Codes	
General Service		Q	+	
Service Name *			Form - Required	
Private Duty Nursing		٥	Acknowledgment of Services (8)	
Start Date	Projected End Date		Form - Other	
02-16-2018	02-24-2018	İİ O	+ Client Incident Report ⊗	
Primary Employee			Skills Needed	
Gregory Petit	🕄 😤 Find Employe	e	+ Nursing Licenses ③	

• To update services, follow these steps in the Edit Services dialog and save your changes.

dit Service				
Service Details				Visit Details
Service Code*				Activity Codes
General Service			Q	+
Service Name *				Form - Required
Private Duty Nursing			0	+
Start Date		Projected End Date		Form - Other
02-16-2018	⊞ 0	02-24-2018	⊞ છ	+ Skilled Nursing Assessment
Primary Employee				Skills Needed
Gregory Petit	0	Sind Employee		+ Nursing Licenses Remove the form from the
Add to Associated En	nplovees			Service Instructions "other" category first



dit Service					×
Service Details				Visit Details	
Service Code*				Activity Codes	
General Service			Q	+ Cli	ck on the + and start typing
Service Name *				Form - Required to sea	arch for the form to be attached
Private Duty Nursing			8	+	
Start Date		Projected End Date		skilled nursing assess	
02-16-2018	İİ O	02-24-2018	İİ O	Skilled Nursing Assessment	
Primary Employee				Skills Needed	
Gregory Petit	0	🚢 Find Employee		+ Nursing Licenses ⊗	
Edit Service				Visit Dotails	×
General Service			Q	Activity Codes	
Service Neme *				Form - Required	
Private Duty Nursing			O	+ Skilled Nursing Assessmen	t 🛞
Start Date		Projected End Date		Form - Other	
02-16-2018	İİ O	02-24-2018	İ O	+	Form is now attached
Primary Employee				Skills Needed	as a "Required" form
Gregory Petit	0	😩 Find Employee		+ Nursing Licenses ⊗	
				Service Instructions	

• To update visits, follow these steps on the calendar and Edit Visit dialog, and save your changes.

ntacts	AlayaCare Healthy 0126 PM America/Toronto V AlayaCare Healthy V RC 🖂 [>
	Gemma Ryan - Private Duty Nursing #463848 X J AlayaCare Healthy,America/Toronto 9 O B96 Eglinton Ave E 7 Toronto ON M4G 2L2 (647) 477-4174, 102 I 12:00 PM - 06:00 PM (Care time: 360 min) 0 D Jabu until September 10, 2023, 12:00 PM to 06:00 PM, Gregory Petit, Starting 08-24-2023 to 12:00 PM 2. click on 'More Details' I Private Duty Nursing - General Service 9 This visit is not funded 1
1. click on the vis	More Details jm/- esco PM (h m) Gregory Petr General Service Gregory Petr General Service Cregory Cregory Petr General Service Cregory Cregory Petr General Service Cregory Cregory Petr General Service Cregory Cregory Petr General Service Cregory Cregory Petr General Service Cregory C



 \times

Edit Visit

Information	Visit ID 463830 Details		Scheduling		
2 Edit 1. Click the	Client *		Start Time * End Time *		
edit tab	Gemma Ryan		08-24-2023 12:00 PM	08-24-2023 06:00 PM	
R Offer	Client Services *		Use Service Duration (60 min) and Care time (60 min)	
E Service Tasks	Private Duty Nursing	Chosen	Break (in Minutes)		
Transportation	PSW	Choose	0		
1 View Notes	Physio SOC	Choose	Recurrence Setup		
Time Approval	PT	Choose	Frequency Type *	Repeat Every *	
Promiume	Infusion	Choose	Daily	1 🖸 day(
			End Date	<u>م</u>	
Invoice Labels	Service Code *	fext	09-10-2023		
Accounting	General Service		Fleview		
	Assign to Facility	Eind Facility	Interventions		
	Assign to Employee	Find Employee			
	Activity Code	Paguirad Forme	Nursing		
	Type to add activity cor	Type to add forms	2 form test		
	Type to did dotting bot	Type to dud territo			
	Skills	Other Forms			
	Type to add skills	Type to add forms			
2 Edit	Client *		Start Time * End	1 Time *	
-1 -11	Gemma Ryan		08-24-2023 12:00 PtØ 0	8-24-2023 06:00 PM	
To Consider Table	Client Services *		Use Service Duration (60 min) ar	nd Care time (60 min)	
E Service Tasks	Private Duty Nursing	Chosen	Break (in Minutes)		
be iransportation	PSW	(Choose	0		
D View Notes	Physio SOC	Choose	Recurrence Setup	neat Every *	
 Time Approval 	PT	Choose	Daily v 1	aay(s)	
Ø Premiums			End Date		
Invoice Labels	Service Code *		Preview		
Accounting	Assign to Facility				
	Type to assign facility	Facility	Interventions		
	Assign to Employee				
	Gregory Petit	Employee	Nursing		
	Activity Code	Required Forms	Medication review form test		
	Type to add activity cor	Skilled Number	Turne to account and a st		
	Skills	Skilled Nursing Assessment	 type to search and selection the form in 'Required' 	801	
	Type to add skills Nursing Licenses ×	Type to add forms			
	Service Instructions				
	Service Instructions		Click 'Update Vis	sit' to save changes	
	Service Instructions		Click 'Update Vis	sit' to save changes	



-	VISILID 403830 Details Scheduling	
🖉 Edit		End Time *
■1 Offer	Confirmation	08-24-2023 06:00 PM
		(60 min) and Care time (60 min)
Æ Service Tasks	O You are editing a visit that is part of a service recurrence	
A Transportation		
View Notes	Please select one of the following actions:	
		Penest Every *
 Time Approval 	Edit all future visits	
Ø Premiums	 Edit all future unmodified visits 	
Invoice Labels	Cancel Confirm	0
Accounting		
	Assign to Facility	
	Type to assign facility Interventions	'Edit all future visits'
	Assign to Employee	
	Gregory Petit	

• On the mobile app, only forms listed as "Required" on a visit will be tagged with the "Required" label. All other forms will appear as they did prior to this feature enablement.

748.00.00 •• 📀 •• 9.5.4.60.0
← Aaron Branson G I
NOT USE - 32772 SERVICE TASKS FORM HISTORY
Client Tasks O >
Forms 20
Client Incident Report Not submitted yet
Pequired* Falls assessment Submitted on Mar 6, 2023 7:47 PM
Required* Systems Assessment Submitted on Mar 6, 2023 7:46 PM
Interventions 👘
Personal Care
Perform falls risk assessment *
8
I this visit
Visit Signature

Option 2: Attach Forms to Care Plan

With Mandatory Forms, forms that are attached through care plan interventions will now appear under the forms section of the service tasks list. The linked forms will appear as either "Required" or "Other."

Define the default behaviour for forms linked to interventions in **System Settings > Care Documentation**. The default behaviour you select here will then apply to both existing and new forms linked to care plan interventions and can be modified per intervention, if needed.

Choose from these default behaviours as appropriate for your agency:



- **Optional**: By default, all forms linked to visits through care plan interventions will fall under the "Optional Forms" forms list.
- **Required**: By default, all forms linked to visits through care plan interventions will fall under the "Required Forms" forms list.
- **Required when intervention is required**: By default, all forms linked to visits through care plan interventions will follow the requirement setting of the intervention itself.
 - If the individual intervention has the "Required for visit completion" setting enabled, the linked form will fall under the "Required Forms" list for the visit.
 - If the "Required for visit completion" setting on the intervention is inactive, then the linked form will fall under the "Optional Forms" list for the visit.

re Q Search clients, employees, contacts		AlayaCare Healthy 0326 PM America/Toronto V AlayaCare Healthy V	RC ⊠ [→
	Time Tracking On Care Plan Interventions	Off	~
	Client's Phone Number Printed In Care Plan Documents	Main	~
	Goal Type Used to Populate Goals Into APRs	Physiotherapy	~
	Default Comment For Service Tasks Not Completed On Clock-Out		
	Oasis Exports For Shp	Off	~
	Ac Standard Form Template Header	Visit scheduled time Visit clocked time Visit adjusted/verified time	
	Default to Archiving Medication When Discontinuing	On	~
	Threshold For Marking Medication Administrations As Early, Late Or Missed (In Minutes)	60	
	Default Vitals Unit	Imperial	~
	Default Behavior of Forms On Care Plan Interventions	✓ Optional Required Required when Intervention is required	VE

Option 3: Request Automated Form Attachment through Alaya Connector

Using our Alaya Connector tool, you can request a complex rule that automates the attachment of forms to services and visits. We have customers successfully leveraging automated daily form attachments to services and visits dependent on the client service name, diagnosis, etc.

Please reach out to your AlayaCare representative for assistance.