

# BECOME A SCHEDULING GENIUS

WITH

# PROCURA



# AGENDA

- Overview of Scheduling Genius
- Overview of Offers
- Overview of the Employee Portal
- Benefits and Value
- Handouts available are:
  - Scheduling Genius PDF
  - Employee Portal PDF
  - Procura Mobile PDF

# TAKING A FRESH APPROACH TO SCHEDULING

Focus on developing mechanisms that will **reduce the workload** of Coordinators and provide direct staff with an **easy, friendly way of managing their work**

- Solutions in Procura:
  - Tools that can aid the Coordinator in their work
  - New Matching Engine
  - New Offer/Callout Management Tools
- Introduce tools that can help direct staff manage their work:
  - New Employee Web Portal

# SCHEDULING GENIUS

# OVERVIEW OF SCHEDULING GENIUS

- Available in Procura 7+ Scheduling or in a Planner
- Visits are generated based on orders in Procura
- Accurately ensures suitable matches for your clients within seconds
- Scheduling Genius tests employees availability, service requirements vs. visit service requirements based on your criteria
- Ability to have settings per your requirements

# SCHEDULING GENIUS

The screenshot shows the 'Employee Match' application window. The interface includes a top navigation bar with 'Home' and 'Options' tabs. Below this is a ribbon with various icons for 'Start', 'Stop', 'Clear', 'Availability', 'Day View', 'Page', 'Refusal', 'Create Offers', and 'Book Employee'. A central area displays client information: 'Client: Barnes, Michael. Address: 701 Fifth Avenue, Seattle, 981, USA, 98104, Area: 98055, Date: 10/4/2010, Times: 09:00 ending (66 mins)'. Below this is a table of 'Employees' with columns for Rank, Area, Category, Pay Level, Last Name, First Name, % (highlighted), Score (highlighted), Seniority Start Date, Home Phone, Start Date, and Hours Worked. A 'Filters remain' panel on the right contains checkboxes for 'Check Availability', 'Check Labor Rules', 'Check Service Reqs.', 'Check Do Not Sends', 'Check Likes / Dislikes', 'Check Language', 'Specific Area', and 'Has Visit History'. At the bottom, a 'Visit Information' table and a 'Rules applied' table are visible.

**Start & Stop Search**

**Matching Progress**

**Filters remain**

**Score % and total**

**Rules applied**

Rank	Area	Category	Pay Level	Last Name	First Name	%	Score	Seniority Start Date	Home Phone	Start Date	Hours Worked
	02	PT	HHA2	Darden	Janet				410-987-6544	7/1/2008	417
		Intake Coordinato	Intake Coordinato	Intake	Irene				435-888-0909	9/8/2009	0
	06	OT	OT	Marshall	Harold				206-555-9999	6/26/2009	4
	06	OT	OT	Rayborn	Steve				425-999-8833	7/6/2009	0
	02	PT	PT	Roberts	Jackson				206-399-9988	5/6/2009	128
	03	HHA	CHHA	Stewart	Elaine			7/12/2004	765-453-2323	7/12/2004	2498
	03	HHA	HHA2	Lord	Faye			9/8/2004	657-432-2432	9/8/2004	2444
	03	Sitter / Companion	Care Giver	Poppell	Vicki			9/8/2004	543-987-5656	9/8/2004	306
	03	HHA	HHA2	Smith	Becky			9/8/2004	543-765-9876	9/8/2004	5965
	03	HHA	HHA2	Taylor	Michelle			9/8/2004	654-345-3434	9/8/2004	560
	03	ST	ST	York	Katrina			2/1/2007	410-765-8765	2/1/2007	60
	01	RN	RN Sample Pay Lev	Eyre	Jane			4/1/2008	443-869-4846	4/1/2008	268
	01	RN	RN Sample Pay Lev	Ratchet	Nurse			5/6/2009	555-555-5555	5/6/2009	40

Date	Times	%	Score	Client
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Rule	Score	Notes
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# OFFERS

# OFFERS

- Create Offers of Work
- Send Offers of Work to Employees via Smart Phone or the Employee Portal
- Expire Offers
- One Time Offers or Multiple Visits
- See Employees Response in Procura
- Less Phone Time
- Streamlined Process



# OFFERS AND CALLOUT MANAGEMENT

- List of most suitable direct staff is generated
- The Coordinator selects the Top X matches to electronically receive an offer of work.

Employee Match

Home Options

Start Stop Clear Info Schedule Notes Profile Info Schedule Availability Day View Page Refusal Create Offers Book Employee

Matching candidates... Client: Barnes, Michael, Address: 701 Fifth Avenue, Seattle, 981, USA, 98104, Area: 98055, Date: 10/4 -> 11:00, Type: Onetime Visit, OFFER EXISTS (Pending (66 mins))

Employees

Rank	Area	Category	Pay Level	Last Name	First Name	Score	Seniority	Start Date	Home phone	Start Date	Hours Worked
	02	PT	HHA2	Darden	Janet				410-987-6544	7/1/2008	417
		Intake Coordinato	Intake Coordinato	Intake	Irene				435-888-0909	9/8/2009	0
	06	OT	OT	Marshall	Harold				206-555-9999	6/26/2009	4
	06	OT	OT	Rayborn	Steve				425-999-8833	7/6/2009	0
	02	PT	PT	Roberts	Jackson				206-399-9988	5/6/2009	128
	03	HHA	CHHA	Stewart	Elaine		7/12/2004		765-453-2323	7/12/2004	2498
	03	HHA	HHA2	Lord	Faye		9/8/2004		657-432-2432	9/8/2004	2444
	03	Sitter / Companion	Care Giver	Poppell	Vicki		9/8/2004		543-987-5656	9/8/2004	306
	03	HHA	HHA2	Smith	Becky		9/8/2004		543-765-9876	9/8/2004	5965
	03	HHA	HHA2	Taylor	Michelle		9/8/2004		654-345-3434	9/8/2004	560
	03	ST	ST	York	Katrina		2/1/2007		410-765-8765	2/1/2007	60
	01	RN	RN Sample Pay Lev	Eyre	Jane		4/1/2008		443-869-4846	4/1/2008	268
	01	RN	RN Sample Pay Lev	Ratchet	Nurse		5/6/2009		555-555-5555	5/6/2009	40

Visit Information

Date	Times	%	Score	Client
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Rule Score Notes

Check Availability  
 Start & Stop Times  
 Consecutive Hours  
 Hours Free  
 Selected Visits  
Start Time:   
Stop Time:   
Duration:   
 OX

Check Labor Rules  
 Show all employees

Check Service Reqs.

Check Do Not Sends

Check Likes / Dislikes

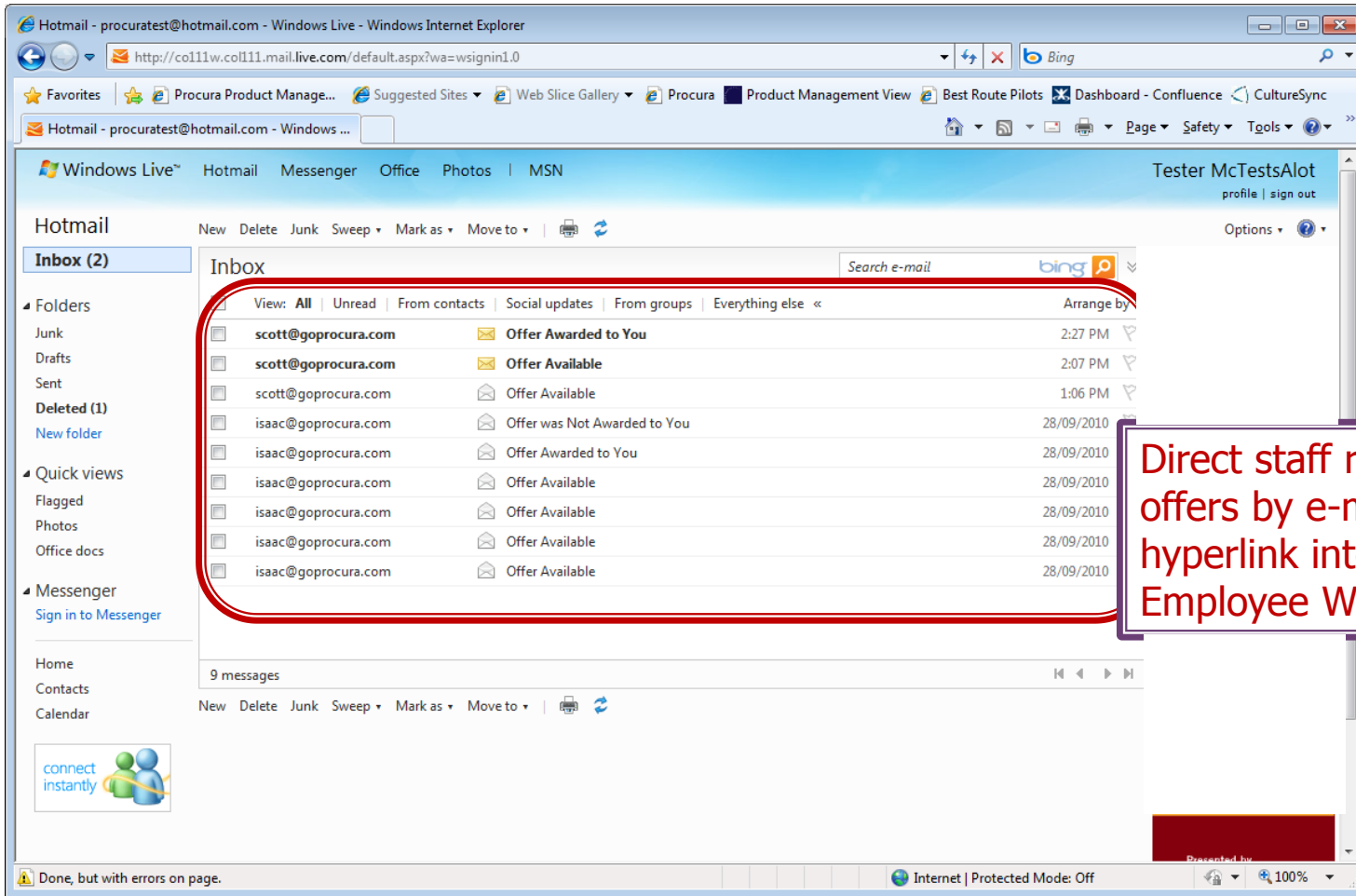
Check Language

Specific Area

Has Visit History  
 Specific History

Seen Client in Past

# OFFERS AND CALLOUT MANAGEMENT



Hotmail - procuratest@hotmail.com - Windows Live - Windows Internet Explorer

http://co111w.co111.mail.live.com/default.aspx?wa=wsigin1.0

Hotmail - procuratest@hotmail.com - Windows ...

Windows Live™ Hotmail Messenger Office Photos | MSN Tester McTestsAlot  
profile | sign out Options

Hotmail

Inbox (2)

Folders: Junk, Drafts, Sent, Deleted (1), New folder

Quick views: Flagged, Photos, Office docs

Messenger: Sign in to Messenger

Home, Contacts, Calendar

connect instantly

Inbox

Search e-mail

View: All | Unread | From contacts | Social updates | From groups | Everything else << Arrange by

From	Subject	Date
scott@goprocura.com	Offer Awarded to You	2:27 PM
scott@goprocura.com	Offer Available	2:07 PM
scott@goprocura.com	Offer Available	1:06 PM
isaac@goprocura.com	Offer was Not Awarded to You	28/09/2010
isaac@goprocura.com	Offer Awarded to You	28/09/2010
isaac@goprocura.com	Offer Available	28/09/2010
isaac@goprocura.com	Offer Available	28/09/2010
isaac@goprocura.com	Offer Available	28/09/2010
isaac@goprocura.com	Offer Available	28/09/2010

9 messages

Done, but with errors on page. Internet | Protected Mode: Off 100%

Direct staff receive offers by e-mail with a hyperlink into the Employee Web Portal.

# OFFERS AND CALLOUT MANAGEMENT

**All visit details**

Client	Employee	Offer	Offer Due	Offer type	Type	Date	Times	Cit. Confirm	Emp. Confirm	Duration	Bill. Dur.	Pay Dur.	Department	Planner
Barnes, Michael	Unfilled Visit	Pending	85 mins	Overtime	Overtime Visit	10/4/2010	09:00 -> 11:00	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	10/4/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	10/11/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	10/18/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	10/25/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	11/1/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	11/8/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	11/15/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	11/22/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	11/29/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	12/6/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	12/13/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	12/20/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
Smith, Roger M	Unfilled Visit	Pending	3 hours	Regular	Every 1 Weeks	12/27/2010	Dur.: 2.0000	No	No	2	2	2	Home Care - Skilled	*Hartfo
No Offer					Every 1 Weeks	10/11/2010	09:00 -> 11:00	No	No	2	2	2	Home Care - Skilled	*Hartfo

**All offers status and due time**

**Specific visit details**

Client: **Smith, Roger M**  
 Phone: 654-234-9876  
 Address: 7654 Alvin Road, Seattle, 981, 98104  
 Birth: 12/16/1920 (89)

Visit Information  
 Duration: 2 Bill Dur.: 2 Pay Dur.: 2  
 Source Employee: O, Scott  
 CVID: 2896  
 Order: (CIGNA) Cigna from 10/17/2004 to ongoing  
 Serv: RN  
 Intake: 9/22/2008 20:20 by PROCURA  
 Changed: 10/1/2010 14:15 by PROCURA  
 Dept.: Home Care - Skilled

**Specific visit offer details**

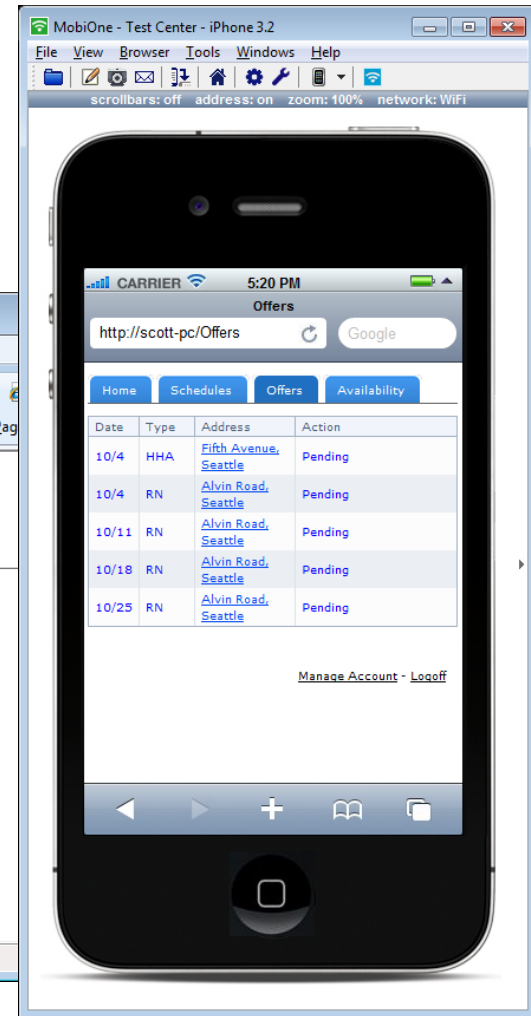
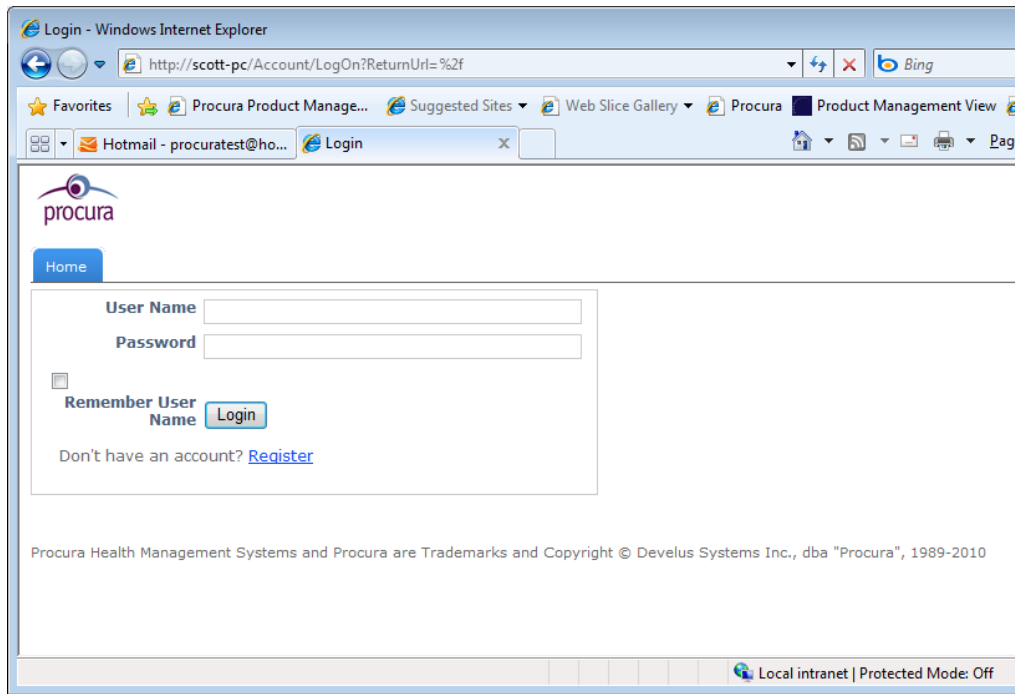
Rank	Employee	Response	Responded	Score
1	O, Scott	Interested	2 hours ago	610
2	Denison, Yvette	No Response		600
3	Lord, Faye	No Response		600
4	Smith, Becky	No Response		600
5	Townsend, Teresa	No Response		600
6	Kendel, Chris	No Response		560
7	Darden, Janet	No Response		550
8	Dashwood, Ellie	No Response		550
9	Stewart, Elaine	No Response		550
10	McColloch, Libby	No Response		550

# EMPLOYEE PORTAL

# EMPLOYEE PORTAL

- See their Schedule with Web Access
- See Pertinent Client Information
- See your Availability Calendar
- Request changes to your Availability
- See Offers Pending
- Respond to Offers

# EMPLOYEE PORTAL



# EMPLOYEE PORTAL

The screenshot shows a Windows Live interface with a Hotmail inbox and a Procura Offers page. The email from scott@goprocura.com contains a link to the Offers page. The Offers page displays a table of pending visits.

Response Date	Status	Address	Gender	Visit Date	Times	Minutes	Patient	Type	Action
N/A	Pending	Fifth Avenue, Seattle	Male	10/4	9:00 AM -> 11:00 AM	120	Onetime Visit	HHA	
N/A	Pending	Alvin Road, Seattle	Male	10/4	Dur.: 2.0000	120	Every 1 Weeks	RN	
N/A	Pending	Alvin Road, Seattle	Male	10/11	Dur.: 2.0000	120	Every 1 Weeks	RN	
N/A	Pending	Alvin Road, Seattle	Male	10/18	Dur.: 2.0000	120	Every 1 Weeks	RN	
N/A	Pending	Alvin Road, Seattle	Male	10/25	Dur.: 2.0000	120	Every 1 Weeks	RN	

Review list of offers and indicate Interested or Not Interested in filling the visit

# EMPLOYEE PORTAL

The image displays two overlapping browser windows. The left window shows a Hotmail inbox with an email titled "Offer Awarded to You" from scott@goprocura.com. The right window shows the Procura employee portal for a client named Michael Barnes, including visit information, client details, and an order service plan table.

**Hotmail Email:**

Offer Awarded to You

scott@goprocura.com

Congratulations. You were awarded offer.

**Procura Portal - Visit Information:**

- Client: Barnes, Michael
- Date: 10/1/2010
- Times: 9:00 AM -> 11:00 AM
- Minutes: 120
- Pattern: Every 1 Weeks
- Type: HHA
- CVID: 4771
- Activities: Status Active

**Procura Portal - Client Information:**

- Client: Barnes, Michael
- Home Phone: 253-777-8888
- Address: 701 Fifth Avenue, Seattle, 981, 98104
- Directions: Area 98055
- Residence Type: Referral Source Unknown
- Referral Date: 7/8/2009
- Comments:

**Procura Portal - Order Service Plan Table:**

Funder	Type	Class	Effective Date	Frequency	Plan of Care Code
(CIGNA) Private Insurance	HHA	Standard	7/8/2009	4 Visits Per Week for 24 Weeks	4WK024
		Standard	7/8/2009	3 Visits Per Week for 12 Weeks	3WK012

Successful staff are notified by e-mail.



# EMPLOYEE PORTAL

The image displays two overlapping browser windows from the Procura Employee Portal. The main window shows a calendar for October 2010 with a red box highlighting the dates from the 3rd to the 31st. Each date has a 'Request Change' link, except for the 1st which is marked 'OFF' and the 29th which is also marked 'OFF'. Below the calendar is a 'Pending Availability Requests' table.

Date	Request	Reason	Action
9/24/2010	Not Available All Day	Illness	
9/25/2010	Available All Day	School	<a href="#">Edit</a>

The second window shows the 'Availability Request' form with a red box highlighting the input fields. The form includes a date selector (10/30/2010), an 'Available' dropdown (I am not available), a 'Reason' dropdown (Illness), and a 'Comments' text area. A 'Request Change' button is at the bottom.

Staff can view their availability.

Staff can request changes which need to be approved by someone in the office.

# EMPLOYEE PORTAL

The screenshot shows a web browser window displaying the Procura Employee Portal. The page has a navigation menu with buttons for Home, Schedules, Offers, Availability, and Account. Below the menu, there is a date range selector set to 10/1/2010 to 10/7/2010 and a search box. The main content is a table with the following columns: Client, Address, Type, Date, Times, Minutes, Pattern, CVID, and Status. The table lists several schedule entries for various clients and dates in October 2010.

Client	Address	Type	Date	Times	Minutes	Pattern	CVID	Status
<a href="#">Barnes, Michael</a>	<a href="#">701 Fifth Avenue, Seattle, 981, 98104</a>	HHA	10/1	9:00 AM -> 11:00 AM	120	Every 1 Weeks	4771	Active
<a href="#">Allen Clinic, Whitcomb</a>	<a href="#">27013 Pacific Hwy S, Ste 201, Seattle, 981, 98198</a>	Care Giver	10/5	8:00 AM -> 12:00 PM	240	Every 1 Weeks	8857	Active
<a href="#">Barnes, Michael</a>	<a href="#">701 Fifth Avenue, Seattle, 981, 98104</a>	HHA	10/6	9:00 AM -> 11:00 AM	120	Every 1 Weeks	2085	Active
<a href="#">Cabot, Tina</a>	<a href="#">22211 Marine View Drive South, Seattle, 981, 98198</a>	HHA	10/7	Dur.: 1.0000	60	Every 1 Weeks	3402	Active
<a href="#">Cabot, Tina</a>	<a href="#">22211 Marine View Drive South, Seattle, 981, 98198</a>	HHA	10/7	Dur.: 1.0000	60	Every 1 Weeks	9159	Active
<a href="#">Cabot, Tina</a>	<a href="#">22211 Marine View Drive South, Seattle, 981, 98198</a>	HHA	10/7	Dur.: 1.0000	60	Every 1 Weeks	8269	Active
<a href="#">Cabot, Tina</a>	<a href="#">22211 Marine View Drive South, Seattle, 981, 98198</a>	HHA	10/7	Dur.: 1.0000	60	Every 1 Weeks	9817	Active
<a href="#">Allen Clinic,</a>	<a href="#">27013 Pacific Hwy S, Ste 201, Seattle, 981, 98198</a>	Care Giver	10/7	8:00 AM -> 12:00 PM	240	Every 1 Weeks	6305	Active

At the bottom of the page, it says "evelus Systems Inc., dba 'Procura', 1989-2010". The browser status bar shows "Local intranet | Protected Mode: Off" and "100%".

Direct staff can see their schedule, client profiles, map and directions whenever they need to.

# **BENEFITS and VALUE**

# BENEFITS AND VALUE OF A SCHEDULING GENIUS, OFFERS, AND THE EMPLOYEE PORTAL

- Streamlines Your Scheduling Processes
- Empower Your Employee
- Reduce Your Administrative Workload and Cost
- Improve Communication
- Web Based Access to Information
- Decreased Telephone Time
- Reduce your paper-based processes

# QUESTIONS?



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