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# THE EVOLUTION OF SMART TOOLS: SMART SCHEDULING AND SHIFT MANAGER

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Director of Product Management at HCHB

# AGENDA

- The evolution of scheduling
- Smart Scheduling
- Shift Manager
- Patient Engagement
- Roadmap
- Q&A





# THE EVOLUTION OF SCHEDULING




ASK THE AUDIENCE:

WHAT IS YOUR BIGGEST  
SCHEDULING CHALLENGE?



# PLEASE WATCH THIS SHORT VIDEO

**HCHB'S AUTOMATED SOLUTIONS**



The image shows three circular icons, each containing a person's head and shoulders, surrounded by a gear. The first icon is purple and shows an elderly man, labeled 'PATIENT ENGAGEMENT'. The second icon is pink and shows a female doctor, labeled 'SHIFT MANAGER'. The third icon is blue and shows a woman, labeled 'SMART SCHEDULING'.

**PATIENT  
ENGAGEMENT**

**SHIFT  
MANAGER**

**SMART  
SCHEDULING**

MAKE IT **EASY!**



# HCHB SCHEDULING BENEFITS FOR EVERYONE



Paul  
Our Patient



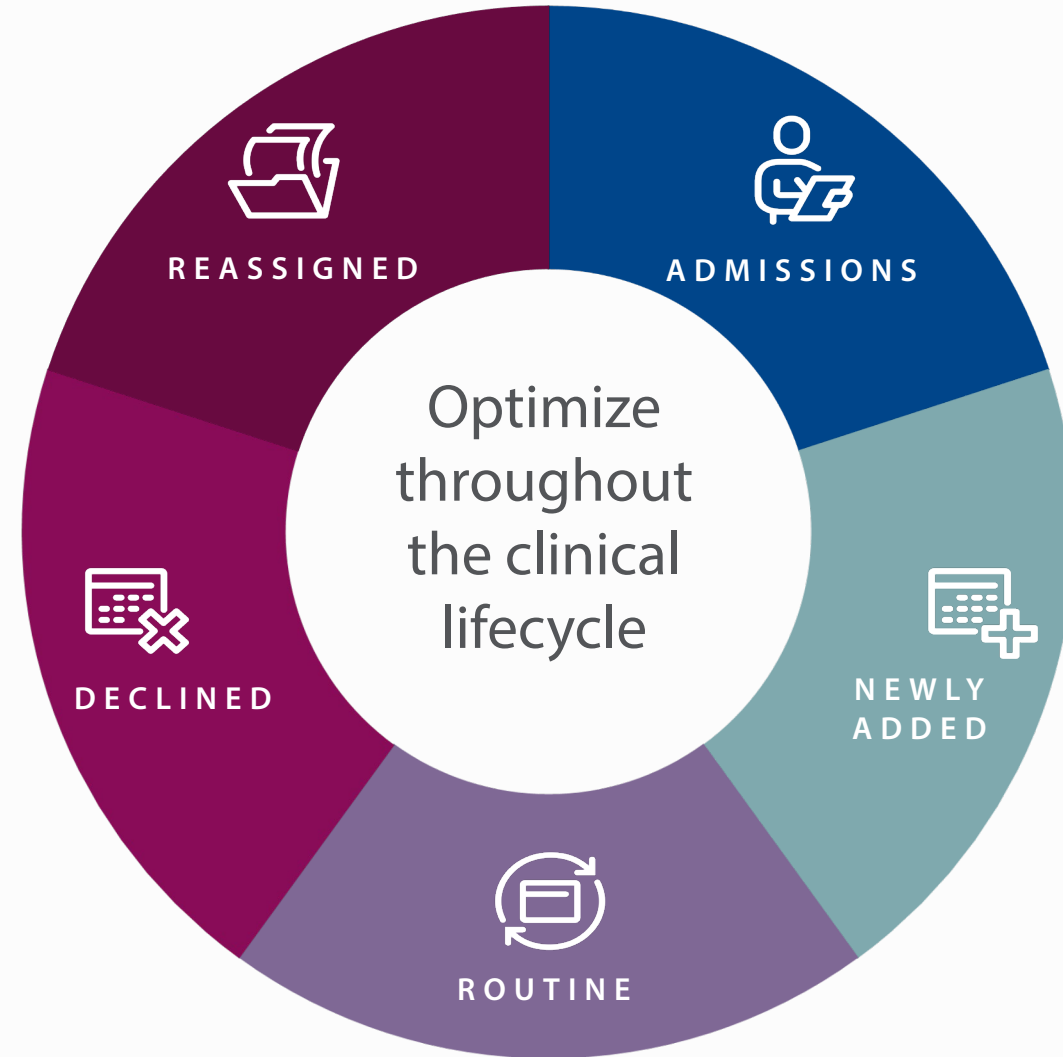
Kara  
Our Clinician



Alex  
Our Scheduler

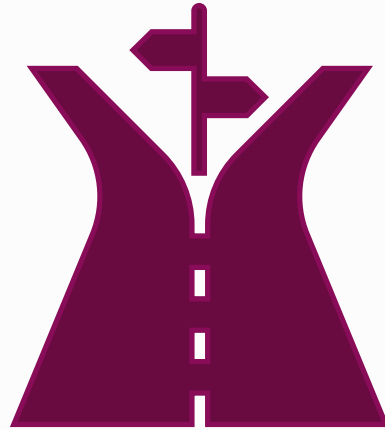
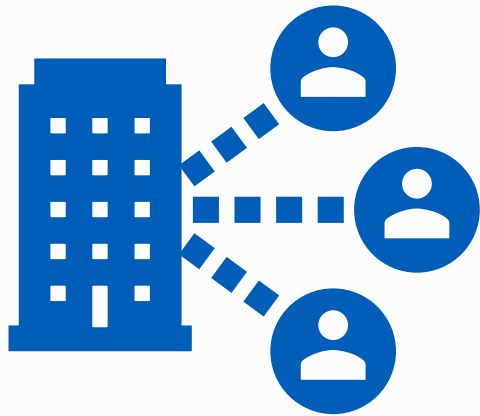


# SCHEDULING AUTOMATION

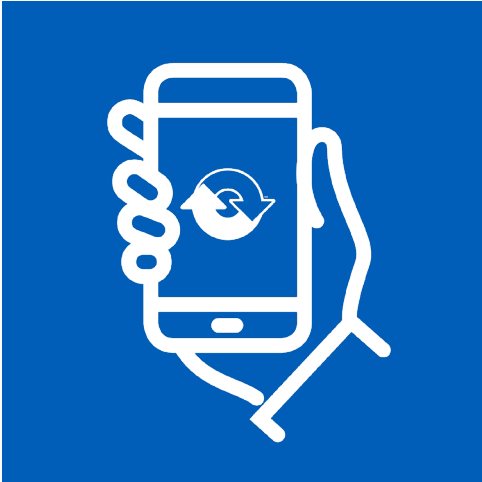




# HIGHLY CONFIGURABLE

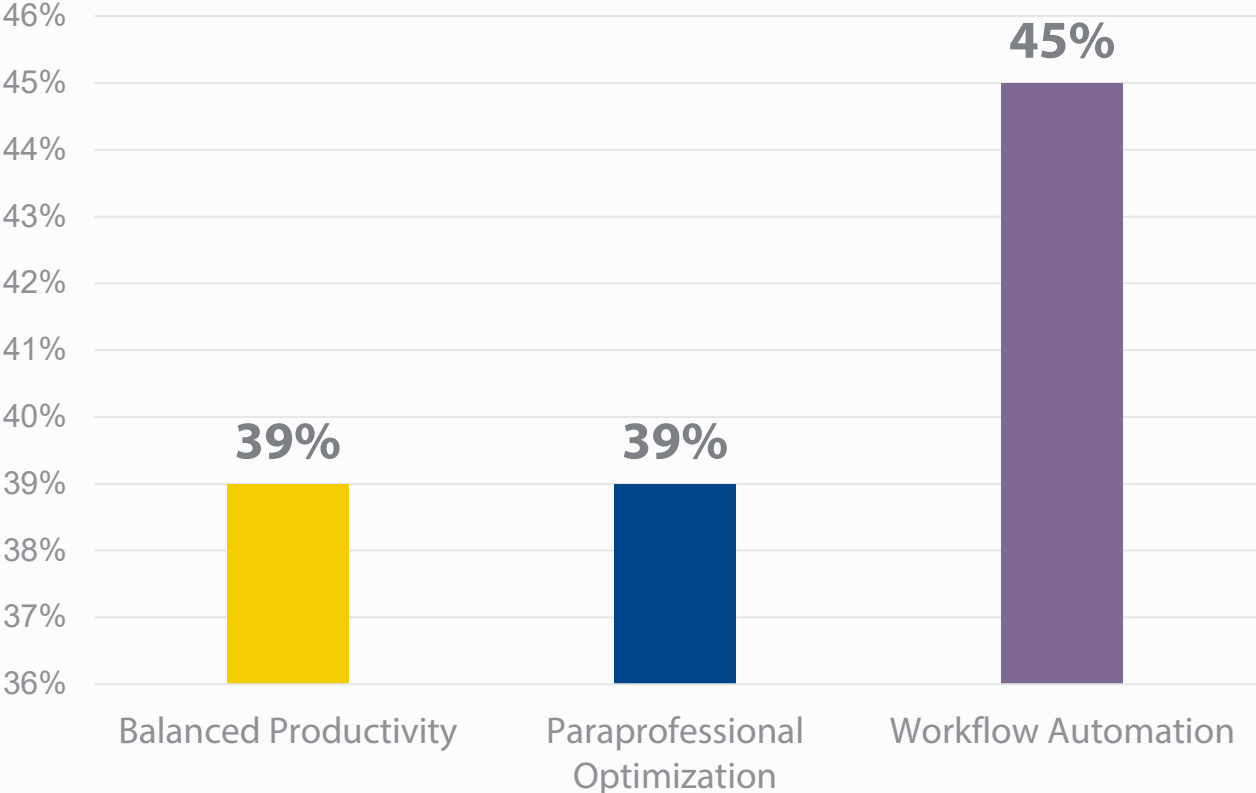


SEAMLESS  
EXPERIENCE WITH  
EXISTING HCHB  
FUNCTIONALITY



# THE IMPACT OF SMART SCHEDULING

Improvement Across Agency Benchmarks



Smart Scheduling is already touching the lives of millions of patients

1.1M  
Scheduled visits  
Q1 2024

8.0M  
Estimated  
scheduled visits  
EOY 2024





# REAL CUSTOMER FEEDBACK ON SMART SCHEDULING

Because of the efficiencies gained from Smart Scheduling, we've been able to complete schedules **2 hours earlier** each day.

That has been a **huge satisfier** for our staff.

With Smart Scheduling, schedulers are now able to look at the bigger picture for field staff and patients.

I see **smiles on their faces** now that I didn't see 6 months ago.

**Sandy Haig**

Senior Director of Operations  
Fidelity Health Care

Before, they were always worried they're going to make a mistake.

It's just less stressful for them overall

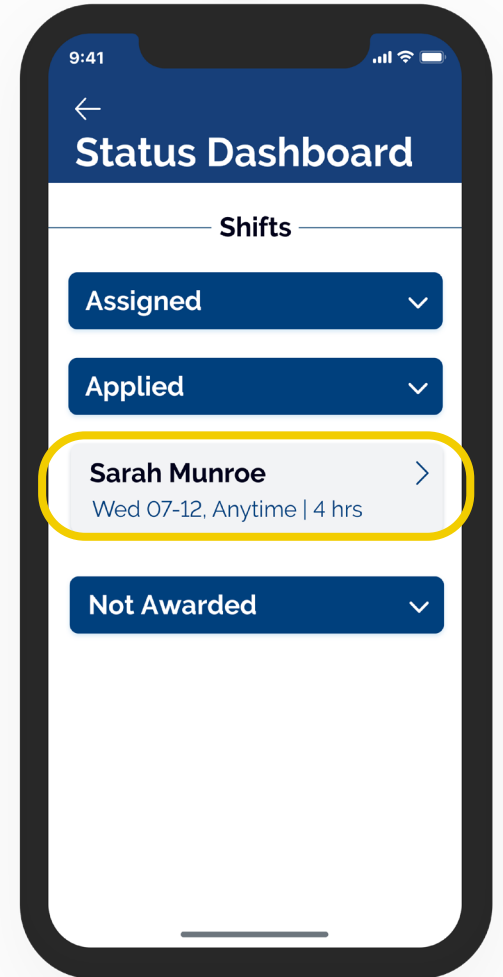
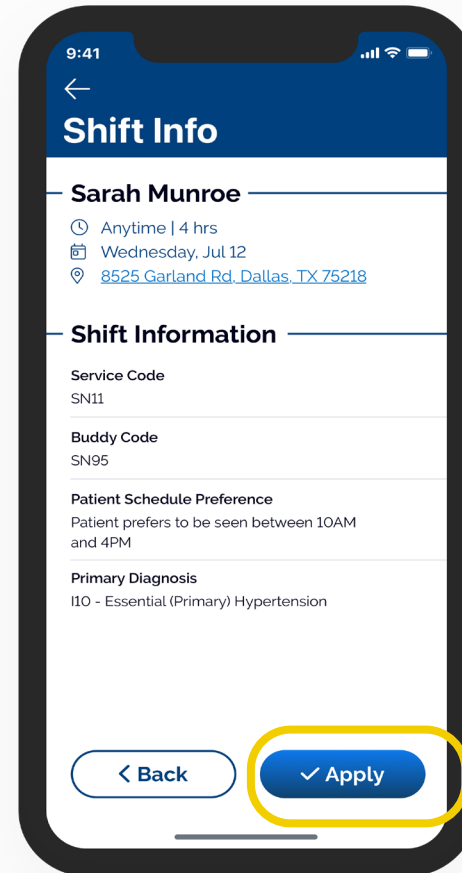
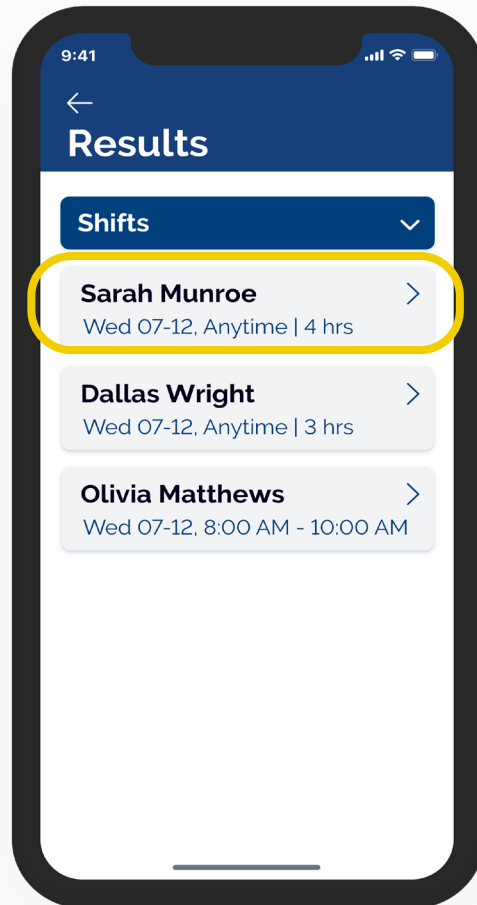
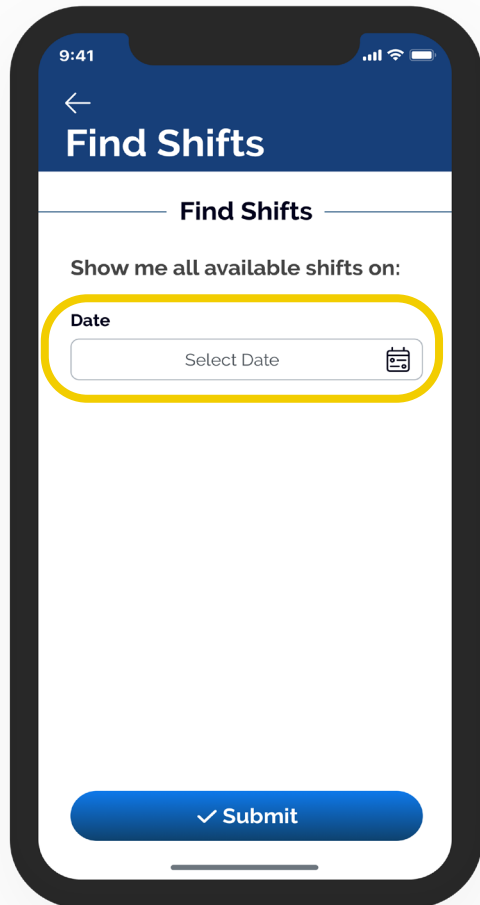


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# SHIFT MANAGER

## EMPOWERING THE CLINICIAN

# SHIFT MANAGER – EMPOWERING CLINICIANS TO FIND THEIR OWN SHIFTS



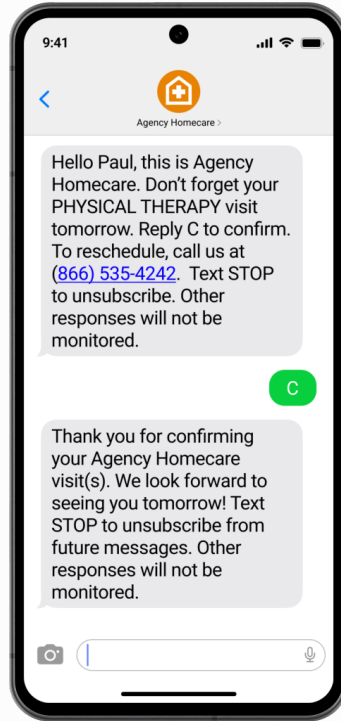


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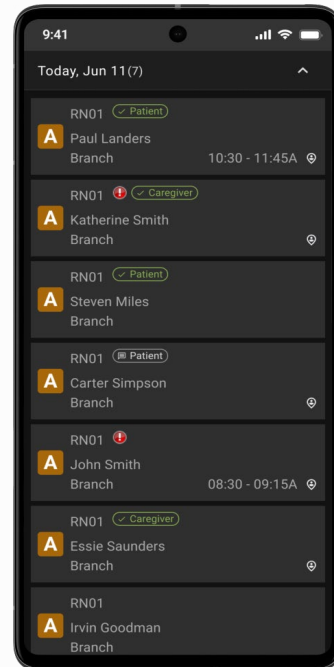
# PATIENT ENGAGEMENT

## KEEPING THE PATIENT INFORMED

# PATIENT ENGAGEMENT



Patient Visit Reminders



Clinician ETA

## Patient Visit Reminders

- Over 50% of participating patients confirm their visit
- Clinicians can save up to 30 minutes/day

Welcome Messages at Referral

Post Visit Survey





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# FUTURE VISION



# WEB SCHEDULING & CARE INTEGRATION

The image displays a web scheduling dashboard with a yellow arrow pointing from a summary view to a detailed view. The dashboard includes several sections:

- Analytics & Metrics:** Features four key metrics: Web Scheduling Alerts (2% decrease), Patient Visit Reminders (54% increase), Smart Scheduling (84% increase), and a summary of visit adjustments.
- Web Scheduling Alerts:** Shows a 2% decrease in visit adjustments from the field. Includes a line chart for the current week and a bar chart for Resolved (blue) and Unresolved (orange) alerts.
- Patient Visit Reminders:** Shows a 54% increase in confirmed visits. Includes a line chart and a bar chart for Reminders Sent (213) and Reminders Confirmed (112).
- Smart Scheduling:** Shows an 84% increase in visits successfully automated. Includes a bar chart for Workers at max hours (3), Visit exceeds rejection cost (1), and Optimizer (4).

The detailed view, titled "Scheduling", includes:

- Filters:** Date range: Rolling 7 days, Branch: ABC.
- Scheduling Status Alerts:** A list of alerts categorized by status: Declined (2), Reassigned (0), Rescheduled (1), and Missed by Clinician (0).
- Scheduling Status:** A list of scheduling items with status indicators: Requested (23), Scheduled (23), Missed (21), Verified (23), Admissions (23), and Patient Visit Reminders (28).
- Visit Details:** A detailed view of a visit for 03/04/2024 - Jones, Jacob, including patient and caregiver information, episode details, authorization, and service code type.
- Visit History:** A calendar view for March 2024 showing visit times from 8:00 AM to 10:00 AM.



# SCHEDULING AND CARE INTEGRATION VISION



Engaged Patients



Empowered Clinicians



Efficient Schedulers



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Q&A



# REQUEST A SMART SCHEDULING DEMO TODAY!

Please contact David Von Tress at [dvtress@hchb.com](mailto:dvtress@hchb.com)

