EVV — Common Scheduling and Care Plan Issues

Troubleshoot common issues involving Aide Care Plans, EVV Visits, and schedule updates in Barnestorm Office.

Overview

This guide covers the most common issues and misunderstandings when maintaining EVV schedules and care plans, including:

- When to use **Stop and Copy** on the Aide Care Plan.
- When to **edit/recreate schedules** vs. update a single entry.
- What actions cause schedule/app problems and should be avoided.
- When Barnestorm Support may need to help clean up existing schedules.

□□ **Related:** Complete Aide Care Plan Manual

Important Schedule Requirements

- Each schedule must have a valid **Program** and **Payer**.
- An appropriate aide **Job Code**
  - Typically, the Job Code matches the payer code
  - The Job Code should have aide revenue codes (e.g., `0570`, `0571`, `0599`).
- A chargeable **visit code**
- A valid **Employee/Caregiver** who is set up correctly in Barnestorm for EVV.

If any of these pieces are missing, the aide may not see the visit/tasks on the app or may be unable to clock out.

#1 Issue – When to Use *Stop and Copy* on the Care Plan

The **Stop** function removes future EVV visits from Care Champ and adds new ones correctly. Use **Stop and Copy** instead of editing the existing plan when any of the following change:

- the assigned aide is permanently changing (not just a substitute).
  - Substitute aides can be applied on the individual schedule.
  - For longer terms of leave, copy and stop and add a plan for the active aide.
- the patient switches payers.
- when adding or removing tasks.
- when task descriptions are updated.
- adjusting patient visit times, days, frequency.

Do NOT:

- Do **not** change the **Thru Date** on the care plan to end services.
- Changing the Thru Date will **not clear future visits** from the app and can cause schedule errors.

☐☐☐ Video:*EVV – Changing the Aide on the Care Plan / Ending Care Plan Early*

When to Edit and Recreate Schedules

Edit/recreate schedules (rather than Stop and Copy) when data was entered incorrectly from the beginning:

- You find **incorrect or incomplete information** on schedules that needs to be updated.
- The **preferred visit time of day** or **day of week** was entered incorrectly.
  - If time or day of the week is changing, then use the Stop and Copy feature.
- Note that this does not keep a historical record of the aide plan.

☐☐☐ Video: *[later use]*

When to Update a Single Scheduled Entry

Update a **single schedule entry** (instead of recreating everything) when:

- The assigned aide **calls off** and a **fill-in aide** will complete that visit only.
- You need to change the scheduled time in and out.

For a single visit, do NOT:

- Do **not** remove the existing scheduled entry and manually add a brand-new one.
- Do **not** copy a past schedule and paste it into a future date.
- Do **not** use the **Recurrence** feature on the Schedule Calendar for EVV changes.

Article: EVV - Change date and / or employee on a single schedule

Issues Prevented When Steps Are Followed

Correct use of Stop and Copy, schedule edits, and single-entry updates will help prevent:

- **Incorrect app schedules** – missing or duplicate visits on the aide's app, even when Barnestorm Office looks correct.
- Aides **unable to clock out** or **unable to view tasks** for a visit.
- EVV visits that do **not print on the weekly visit note**.

Extra Tips for Adding/Editing Scheduled Visits

Do NOT use these screens for EVV schedules:

- Do not copy previously used schedules and paste them into future dates.
- Do not use **Schedule Entry**, **Medicaid Weekly**, or **Medicaid Monthly** screens to add EVV schedules.

Recommended:

- Use the **EVV Visits** or Schedule screen to add extra schedules.
- Always be sure to select the correct **Aide Care Plan** when adding a new schedule.

When to Contact Barnestorm Support

If incorrect steps have already been taken on an existing care plan (for example, manual schedule edits in multiple places or incorrect Thru dates), Barnestorm Support may need to:

- Clean up incorrect schedules in the background.
- Remove problem visits and rebuild them using the correct EVV workflow.
- Help ensure the app and Barnestorm Office are back in sync.

Tip: When in doubt, stop and copy the care plan for permanent changes, and use the EVV Visit screen for one-time schedule fixes.

Knowledgebase
http://kb.barnestorm.biz/KnowledgebaseArticle51610.aspx