BlueSky Mobile Training Manual

Revised January 2025

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Setting Up Login Credentials for Caregivers

Overview

Before caregivers can log in to the app, admin users must set up their login credentials in BlueSky. Alternatively, new applicants using the BlueSky employment application process (Full Apply and Short Apply) can create their own credentials.

Admin-Generated Credentials

1. Navigate to Caregivers:
    - Go to Entries, then click on Caregivers.
    - Select the caregiver for whom you want to set the credentials.
2. Access User ID / Password Menu:
    - On the general page, click the “User ID / Password” button.
3. Set Username and Password:
    - Enter the desired login username and password.
4. Enable Login:
    - Check the "Login Allowed" checkbox.
    - Caregiver status must be "Active" or "Pre-Active"
5. Save the Changes:
    - Click “OK” in the User ID / Password menu.
    - Click “Save” in the top right corner.

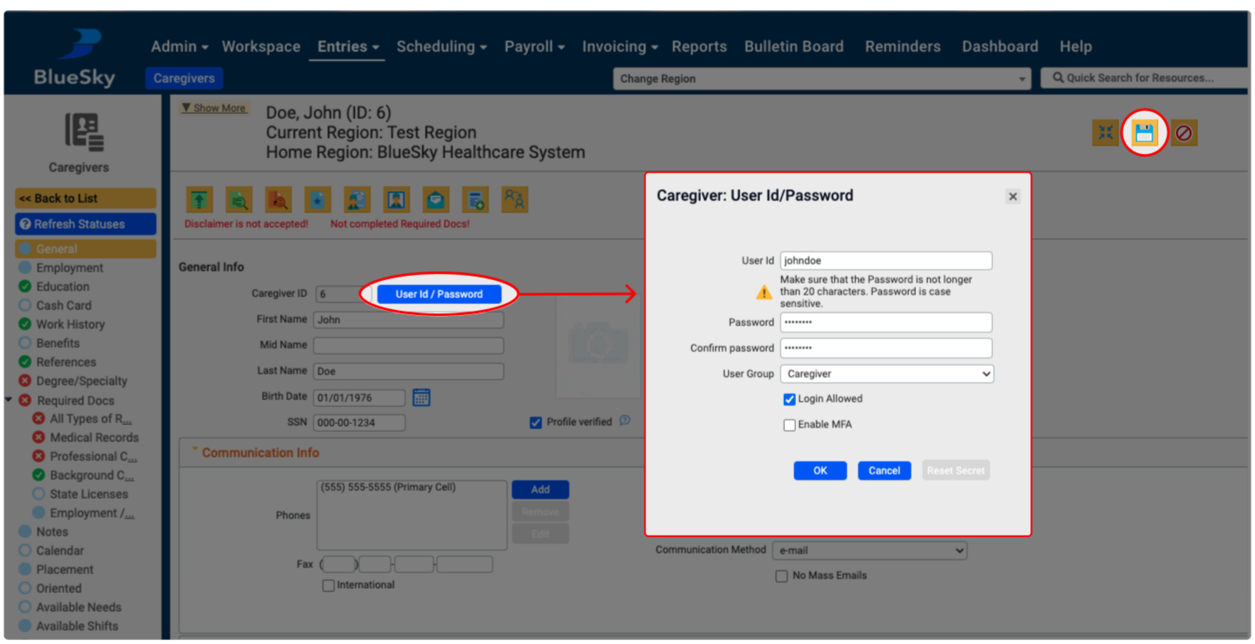


Figure 1: How to manually set caregiver login credentials.

Hint: Be sure to click “save” in the top right corner to store the login credentials. A prompt to save will appear before navigating away from the page.

Applicant-Generated Credentials

For new applicants using BlueSky's Full Apply or Short Apply, login credentials can be automatically generated and sent to the caregiver if the appropriate company setup setting is enabled for the selected region. This setting can be found in Admin > Setup > Company Setup:

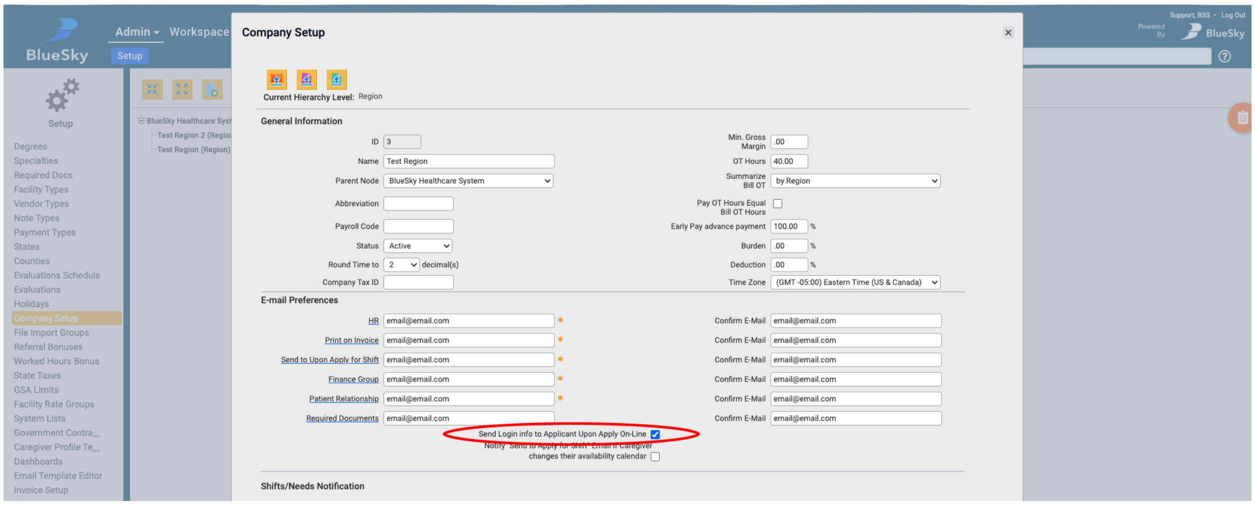


Figure 2: How to enable auto-generated credentials for applicants.

Long Application (Full Apply):

1. Applicants enter their information and create a username and password.
2. Upon submission, a welcome email is sent with their login credentials.

Short Application (Short Apply):

1. Applicants only need to enter their name and email address.
2. Upon submission, a welcome email is sent with a generated user ID and password.

Hint: While applicants can log in to the mobile app, functionality is extremely limited for this user group. The BlueSky Mobile app is intended for pre-active and active caregivers.

Downloading and Logging into the App

Overview

Learn to download, setup, and login to the BlueSky Mobile App.

Step-by-Step Guide

1. Download the “BlueSky Mobile Caregiver App” from the Apple App Store (for iPhones) or the Google Play Store (for Android phones).
2. Open the app and tap 'Edit Your Companies.'
3. Click on the ‘+’ in the upper right corner.
4. Enter the company name and code.
5. Click 'Add.'
6. Enter the username and password.
7. Select a company (created in step 2)
8. Click 'Sign In.'

Hint: Ensure all caregivers have your company code prior to downloading and using the app. Your company code is the alias used in your BlueSky URL. This is the portion of the URL that comes before the .blueskymss.com part:

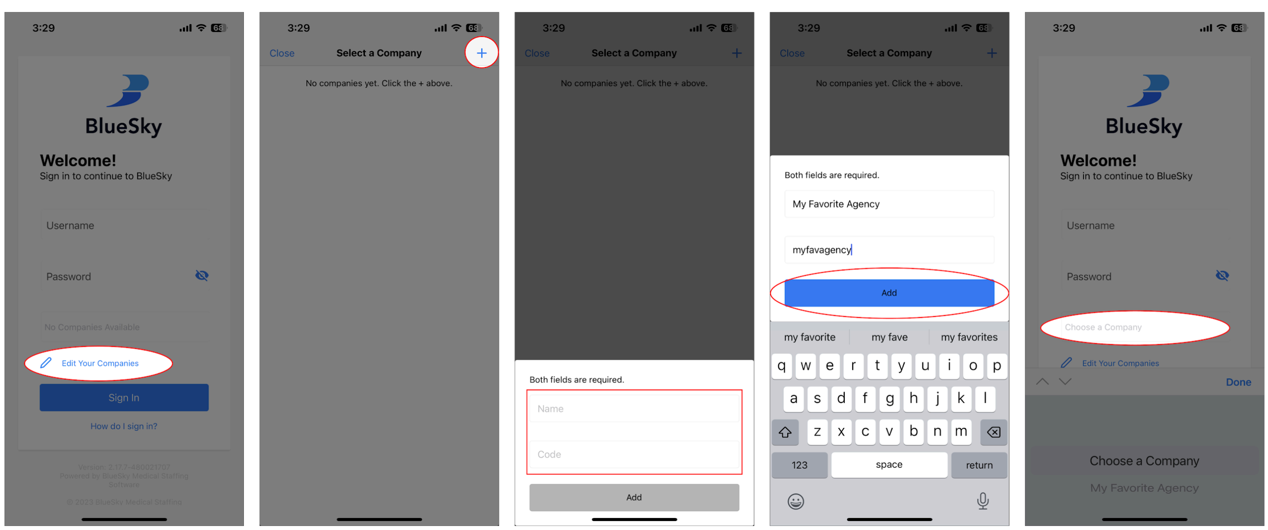


Figure 3: How to add a company code on the login page.

Quick Login: Enabling FaceID, TouchID or Passcode Login

1. Follow first-time login instructions (complete the steps mentioned in the previous section).
2. Upon launching the app after initial login, users will be prompted by their device to enable FaceID, TouchID, or Passcode login.
3. When enabled, the app will use the selected login method, eliminating the need for a username and password entry.

Hint: This feature is device specific. The selected quick login method (FaceID, TouchID, or Passcode) must be available and configured in the phone settings before it can be used with the BlueSky Mobile App.

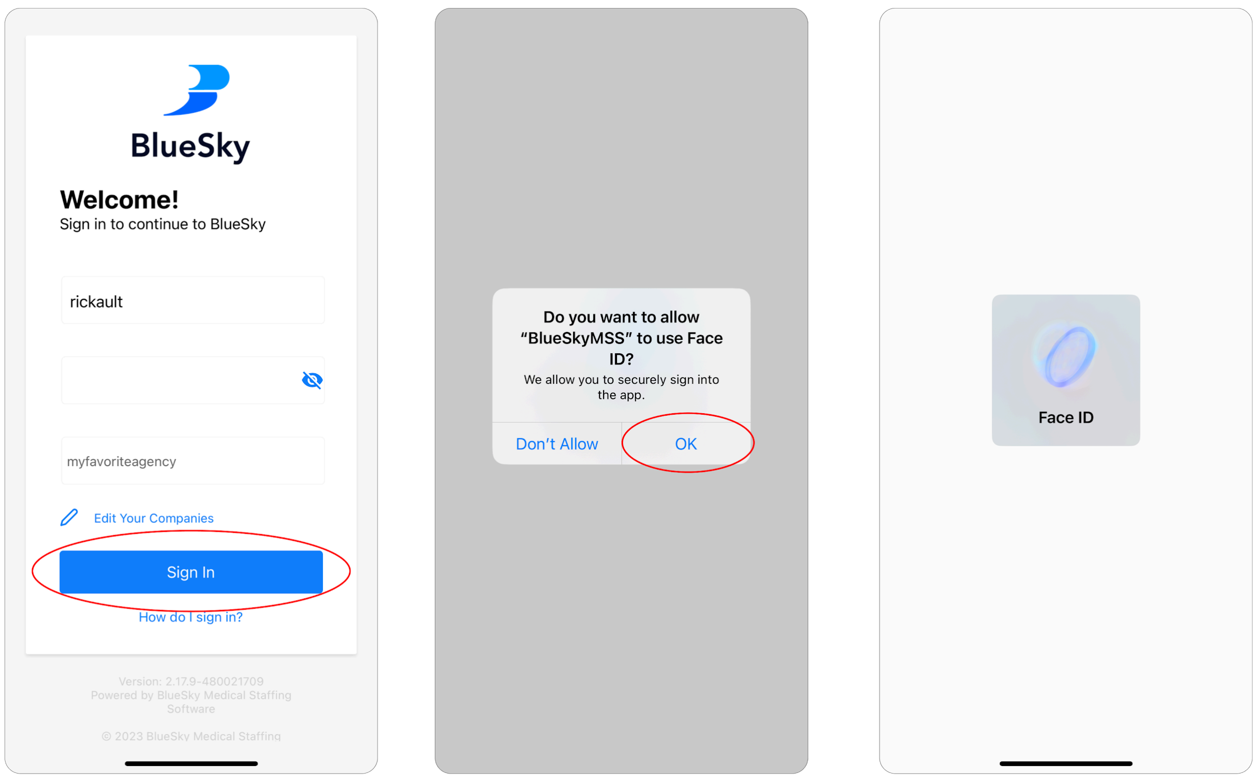


Figure 4: Enabling FaceID for Quick Sign-In.

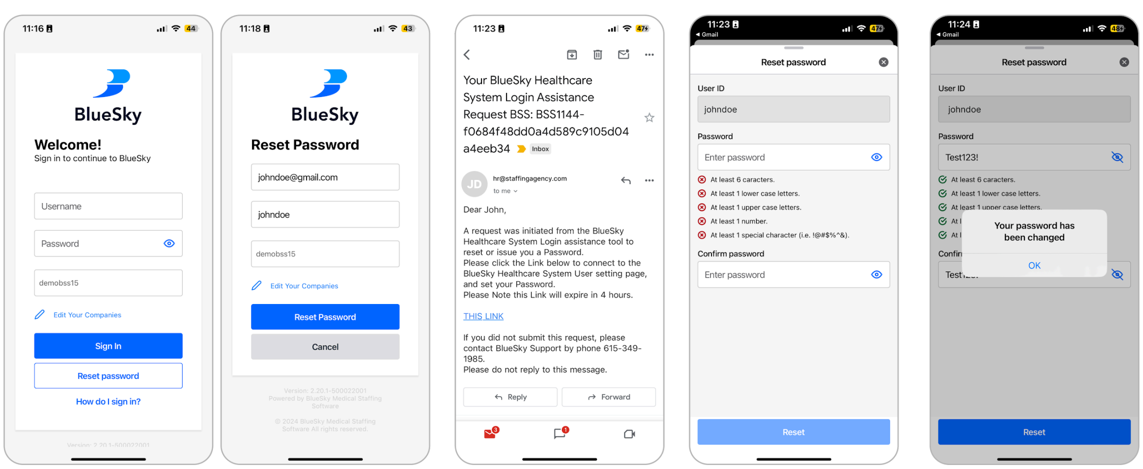
Password Reset Tool

Overview

Caregivers can easily reset their passwords in the mobile app by providing their username, email address, and company code.

Step-by-Step Instructions

1. **Open the Mobile App**: Launch the mobile app on your device.
2. **Tap the "Reset Password" Button**: On the login screen, locate and tap the "Reset Password" button.
3. **Enter Your Email and Login Username**: Provide the email address and login username associated with your account.
4. **Enter Your Company Code**: Input your agency's provided company code. If you've previously logged in, your company code will already be selected.
5. **Tap "Reset Password"**: Confirm your request by tapping the "Reset Password" button.
6. **Confirmation Message**: If your email, username, and company code are correctly matched, a confirmation message will appear on the screen.
7. **Check Your Email**: A password reset email will be sent to the associated email address. Open your email inbox to find it.
8. **Open the Reset Link**: In the email, tap the provided link to proceed with resetting your password. This link will take you back to the mobile app.
9. **Enter and Confirm New Password**: In the app, enter your new password and confirm it by tapping "Reset."
10. **Final Confirmation**: A message will confirm that your password has been successfully reset.
11. **Log In with New Credentials**: Return to the login page and enter your new password along with your username to access your account.



Viewing Scheduled Jobs

Overview

The Home and Schedule Tabs in the app provide a comprehensive overview of caregivers' upcoming and past jobs.

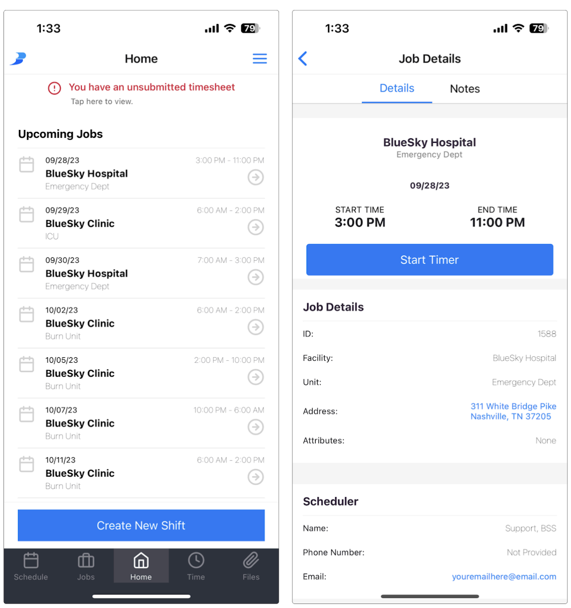
Home Tab

The Home tab is immediately visible upon login and displays a comprehensive list of upcoming jobs for easy and quick viewing. Caregivers can tap on any listed job to access additional details including shift timings and facility information.

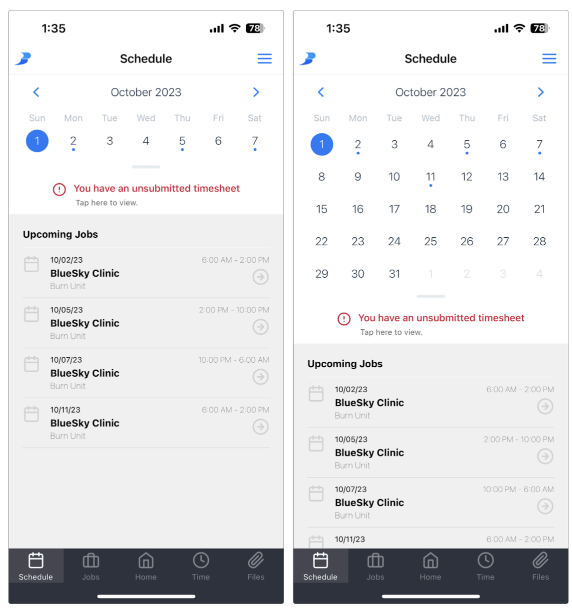
Schedule Tab

The Schedule tab provides a split-screen view, offering a monthly calendar at the top and a corresponding list of jobs for the selected month below.

- Red dots on the calendar denote shifts with unsubmitted timesheets, and blue dots indicate scheduled shifts.
- As caregivers alter the calendar month, the job list below automatically updates, showing the relevant shifts for the chosen month.
- Similar to the calendar indicators, jobs listed in red represent shifts with missing timesheet submissions.



Home Tab View



Schedule Tab View

Shift Comments

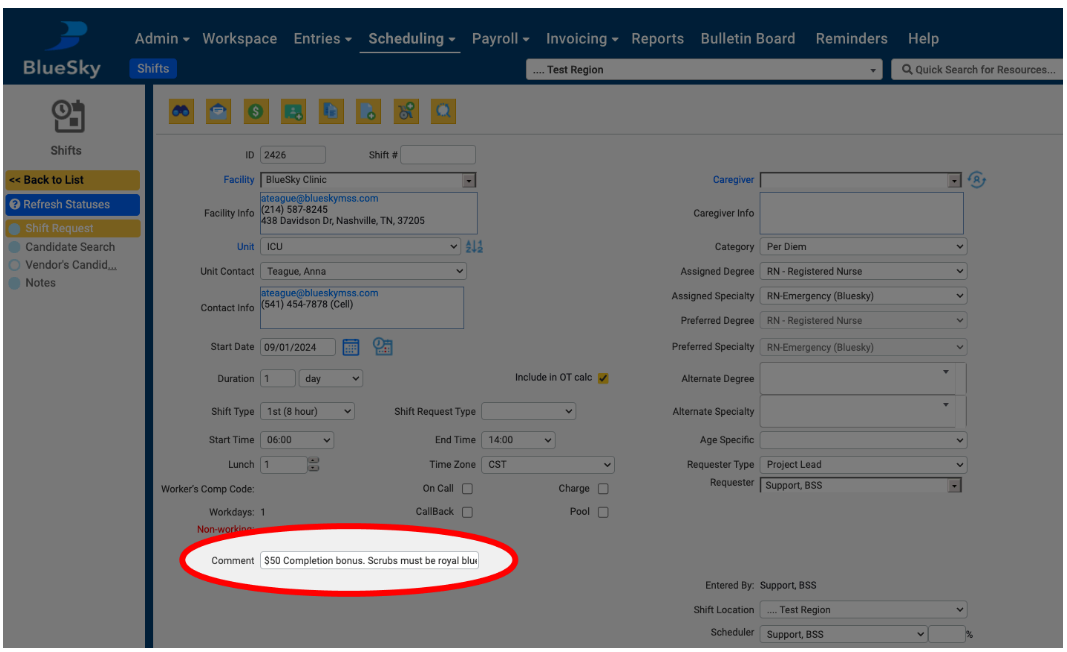
Overview

Caregivers can view custom shift comments directly in the app. Whether it's incentives, arrival instructions, or any other notes, the text added in the "Comment" field during shift creation will be visible for both open and assigned shifts. Company users have full control over the visibility of this field through Permissions settings.

> *Note: For instructions on enabling or disabling these buttons, please see the permissions section of this guide.*

How to Add Comments to Shifts (for Admins)

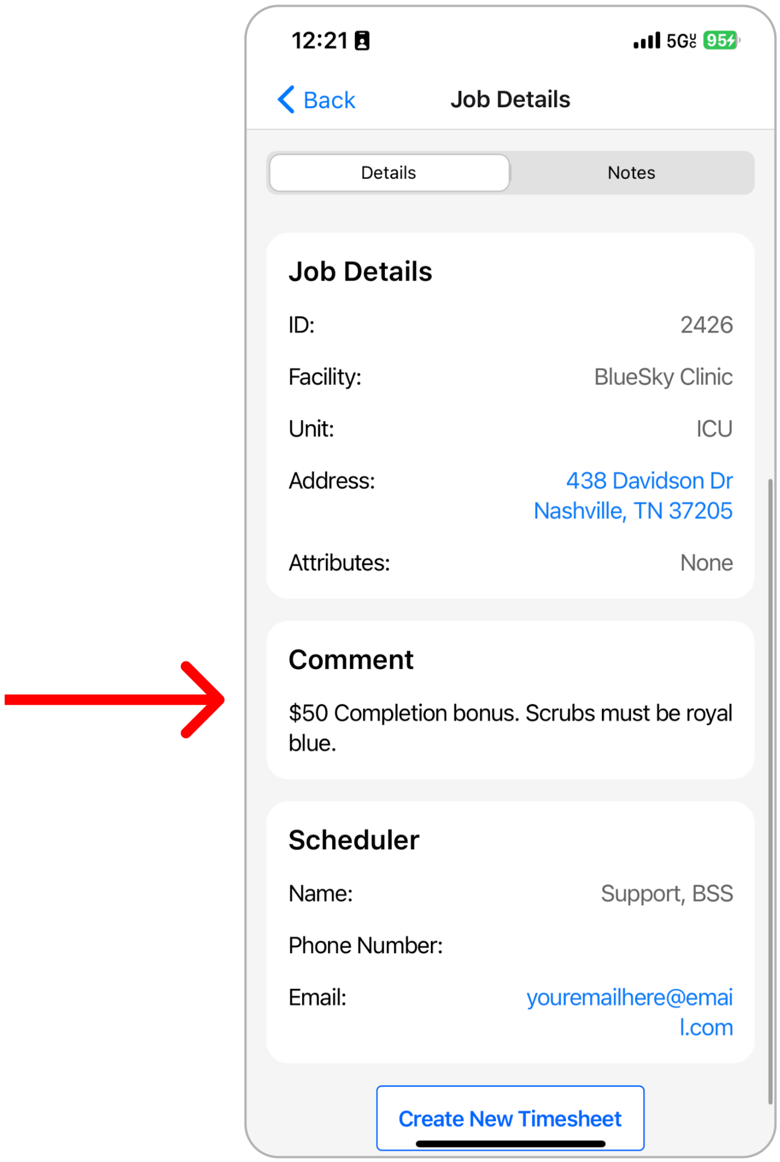
1. As a company user, start by logging into the BlueSky web portal.
2. Navigate to the Shifts grid by clicking Scheduling > Shifts.
3. In the Shifts grid, choose an existing shift or create a new one.
4. In the Shift Detail Form, locate the "Comment" field.
5. Add any desired comments or notes.
6. Click "Save" to save the shift details and newly added comments.



Viewing Comments in the App (for Caregivers)

When a caregiver views the shift in the mobile app, the comment field will be displayed. This field is visible in all shift pages, including:

- Open, unassigned shifts
- Assigned shifts
- Past shifts



Submitting Timesheets

Overview

This section describes the process caregivers will follow to submit timesheets for both scheduled and ad-hoc shifts using the app.

Submitting Timesheets for Scheduled Shifts

1. Accessing Scheduled Jobs: Upon login, caregivers will see their upcoming jobs on the home screen.
2. Starting the Shift Timer: Caregivers will tap on the scheduled shift and then tap “Start Timer.” The timer begins and continues running in the background.
3. Taking and Ending Breaks: During a scheduled break, caregivers should return to the app and tap “Break” and tap “Resume” to end the break.
4. Clocking Out: To clock out, caregivers will tap “Finish”. A prompt appears to confirm the end of the shift.

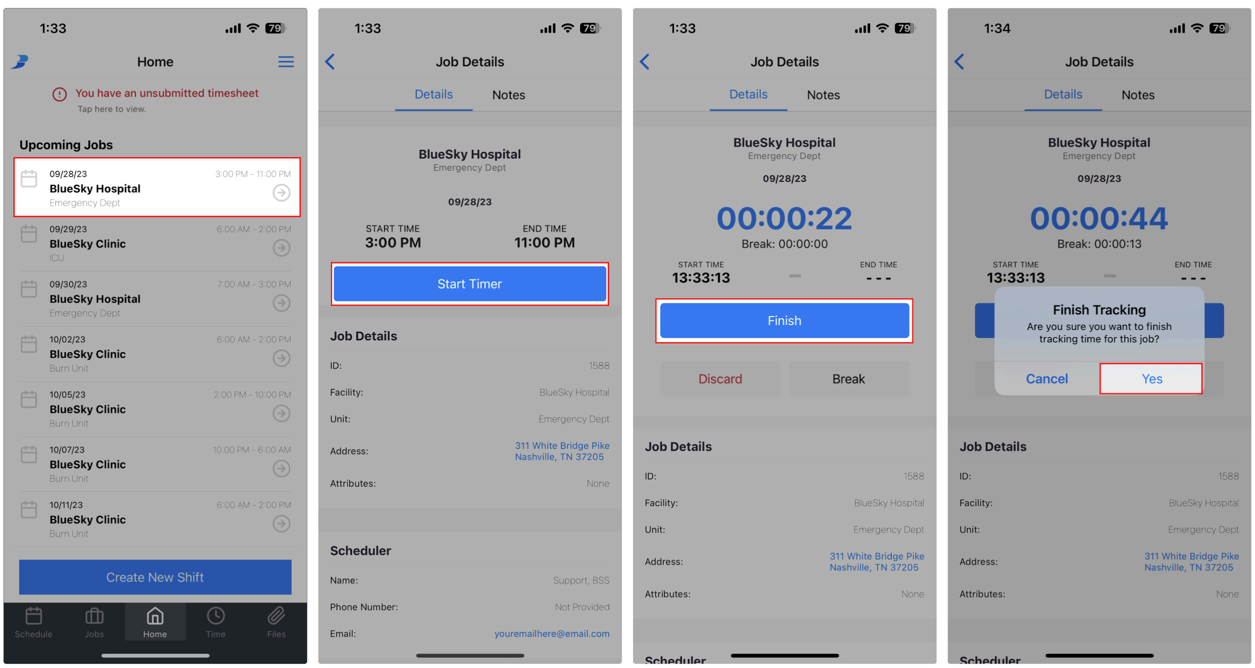


Figure 5: How to use the in-app timeclock.

5. Attaching a Signature (Optional)

- Caregivers can attach a timesheet image by tapping Take Picture or Choose Picture.
- Alternatively, caregivers can have a manager physically sign the timesheet by tapping Manager Signature.
  - The approving manager can review the timesheet and sign the digital signature pad.
  - The signature pad is stamped with the shift details and uploaded as a timesheet image attachment.

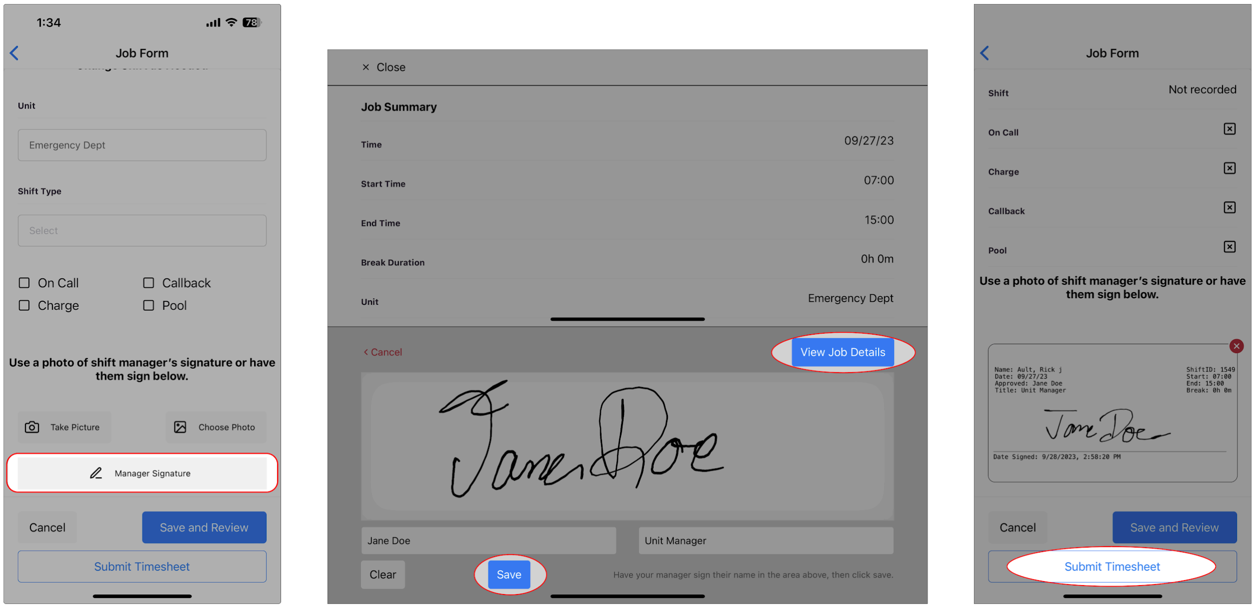


Figure 6: How to attach a manager's physical signature.

6. Submitting the Timesheet: After confirming the end of the shift, caregivers review the time tracked. If correct, they tap "Submit," or "Save and Review" to submit at a later time.

Creating Timesheets

Overview

This section describes two important features that caregivers can use to create timesheets for shifts that were not scheduled in advance.

1. Create New Shift Button: Allows caregivers to manually create timesheets for unscheduled shifts.
2. Create New Timesheet Button: Allows caregivers to manually create timesheets for unscheduled shifts by duplicating an existing timesheet or shift.

Note: For instructions on enabling or disabling these buttons, please see the permissions section of this guide.

Create New Shift Button:

Caregivers can create timesheets for unscheduled (ad-hoc) shifts by using the "Create New Shift" button. For new shifts, caregivers must select the date, clock-in times, facility, and unit. This option is particularly useful in scenarios where an agency may not know in advance the specific dates and/or locations a caregiver is directed to work by the facility. Upon inputting these details, the timesheet system automatically creates a corresponding shift and searches for applicable rates

1. Tap the Create New Shift button on the home tab.
2. Enter the appropriate shift information, including facility, unit, and shift type.
3. Attach an optional photo or attachment.
4. Tap Submit to submit the timesheet.

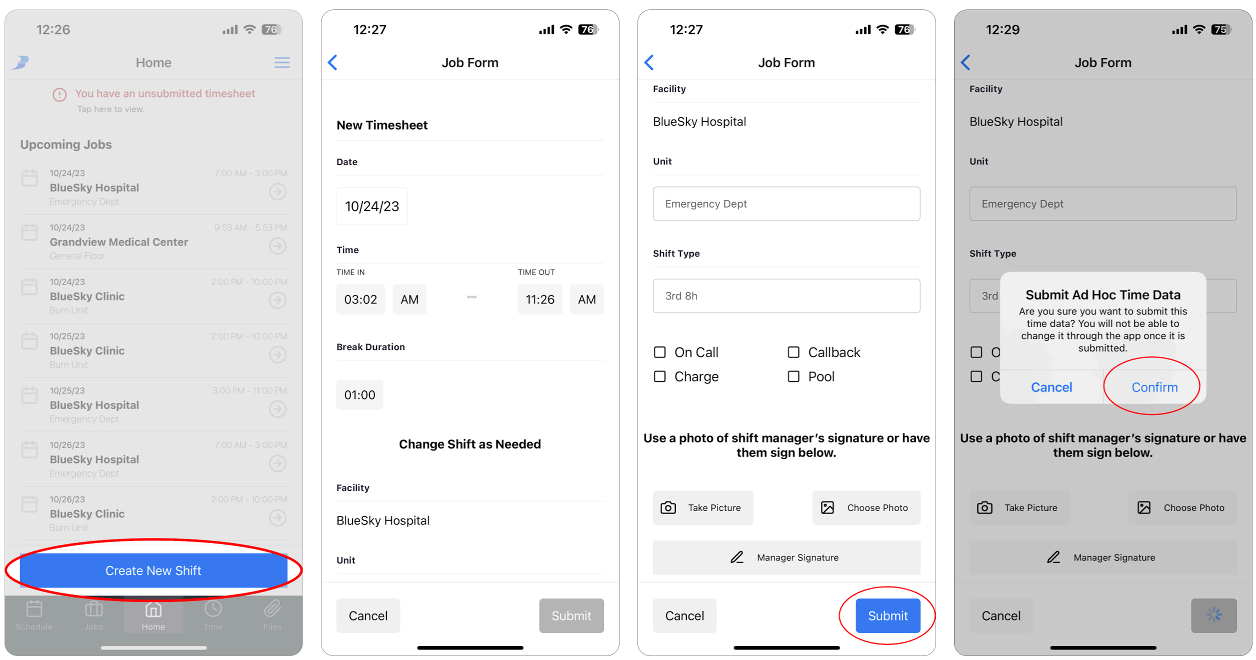


Figure 7: How to Submit an Ad-Hoc Timesheet.

Create New Timesheet Button

When enabled, the "Create New Timesheet" button appears in the detail view of an assigned shift. It's also visible at the bottom of both unsubmitted and completed timesheets. This feature allows caregivers to generate a duplicate timesheet to edit. The duplicated timesheet inherits the base shift's contract ID (if applicable) from the initial shift it was generated from. Unlike the "Create New Shift" button, the "Create New Timesheet" feature allows for the creation of timesheets that are directly linked to an existing contract with appropriate contract rates.

1. Tap on the Time tab at the bottom of the screen
2. Tap on the History tab at the top of the page to view submitted timesheets.
3. Select a timesheet to duplicate from the list.
4. Scroll to the bottom of the timesheet detail page.
5. Tap the Create New Timesheet button.
6. Enter the appropriate shift information, including clock times, unit, and shift type.
7. Attach an optional photo or attachment
8. Tap Submit to submit the timesheet.

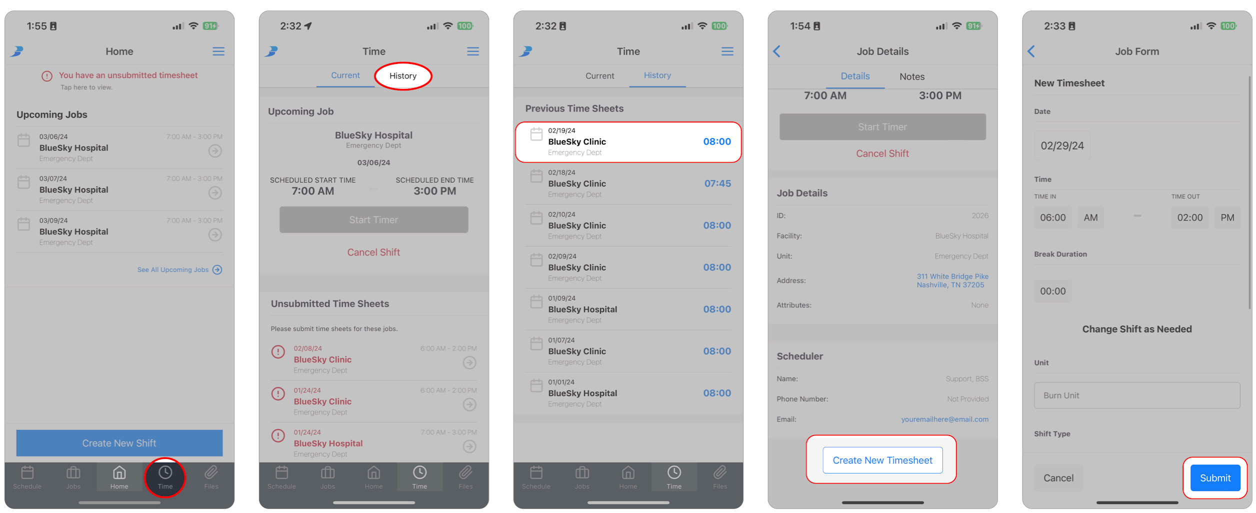


Figure 7: How to use the Create New Timesheet Button

Viewing and Applying to Open Jobs

Overview

Learn how to view and apply for open jobs within the app.

> *Note: For instructions on enabling or disabling access to open jobs, please see the permissions section of this guide.*

Submitting an Application

1. Tap on the Jobs tab in the bottom menu to navigate to the list of available jobs.
2. Browse through the job listings and select the desired shift.
3. Tap Apply at the bottom of the screen to submit the application.

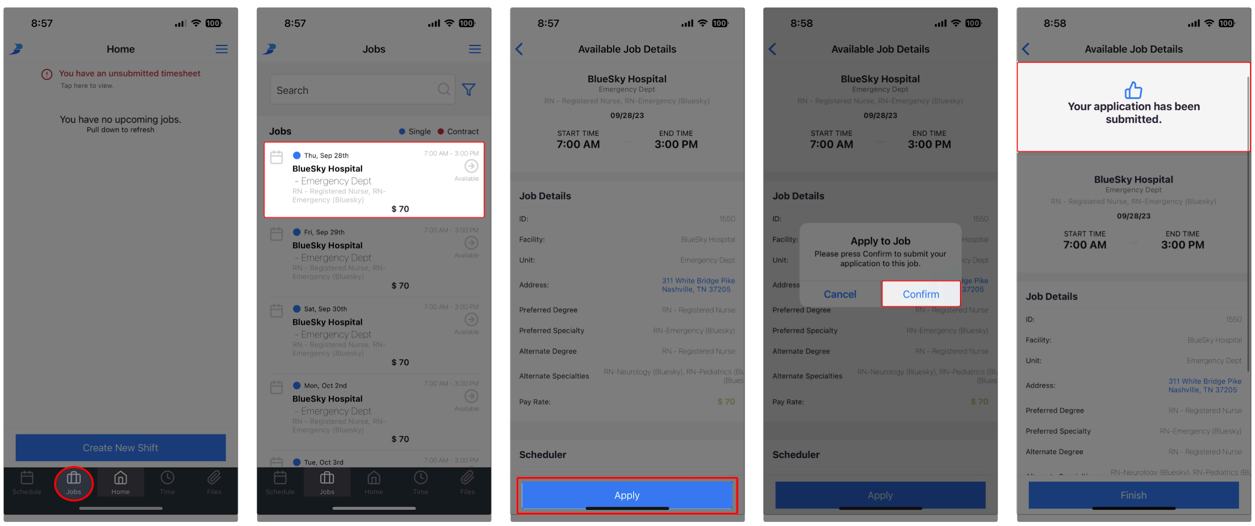


Figure 8: How to apply to an open job.

Hint: By adjusting the "Job Status" filter on the Jobs tab to "Applied," caregivers can easily view and keep track of their own job applications within the app.

Filtering the Open Jobs List

To make your job search more efficient, the BlueSky Mobile App allows you to apply filters to your job search, helping you find jobs that specifically match your criteria. Here's how to use the filter feature:

1. Navigate to the 'Jobs' tab.
2. Tap on the filter icon in the top right.
3. Adjust the following parameters to hone your job search:
   - **Job Status**: Select from Available, Applied, or Assigned (Unconfirmed) jobs.

- **Job Location**: Enter a desired city, state, or zip code.
- **Distance**: Use the slider to set the preferred search radius from the chosen location.
- **Facilities**: Select from facilities with current job openings.
- **Unit**: Choose a particular unit within a facility with open positions.
- **Degree**: Filter jobs based on your qualifications (e.g., RN, LPN).
- **Specialties**: Filter based on your professional specialties.
- **Ignore Alternate Degree and Specialty Matches**: Enable this setting to hide jobs that accept alternate qualifications with non-applicable pay rates.
- **Days**: Filter by specific days of the week.
- **Job Type**: Differentiate by single or contract positions.
- **Time**: Specify a start and/or end time for job availability.

4. Tap ‘Save’ to activate the filters.

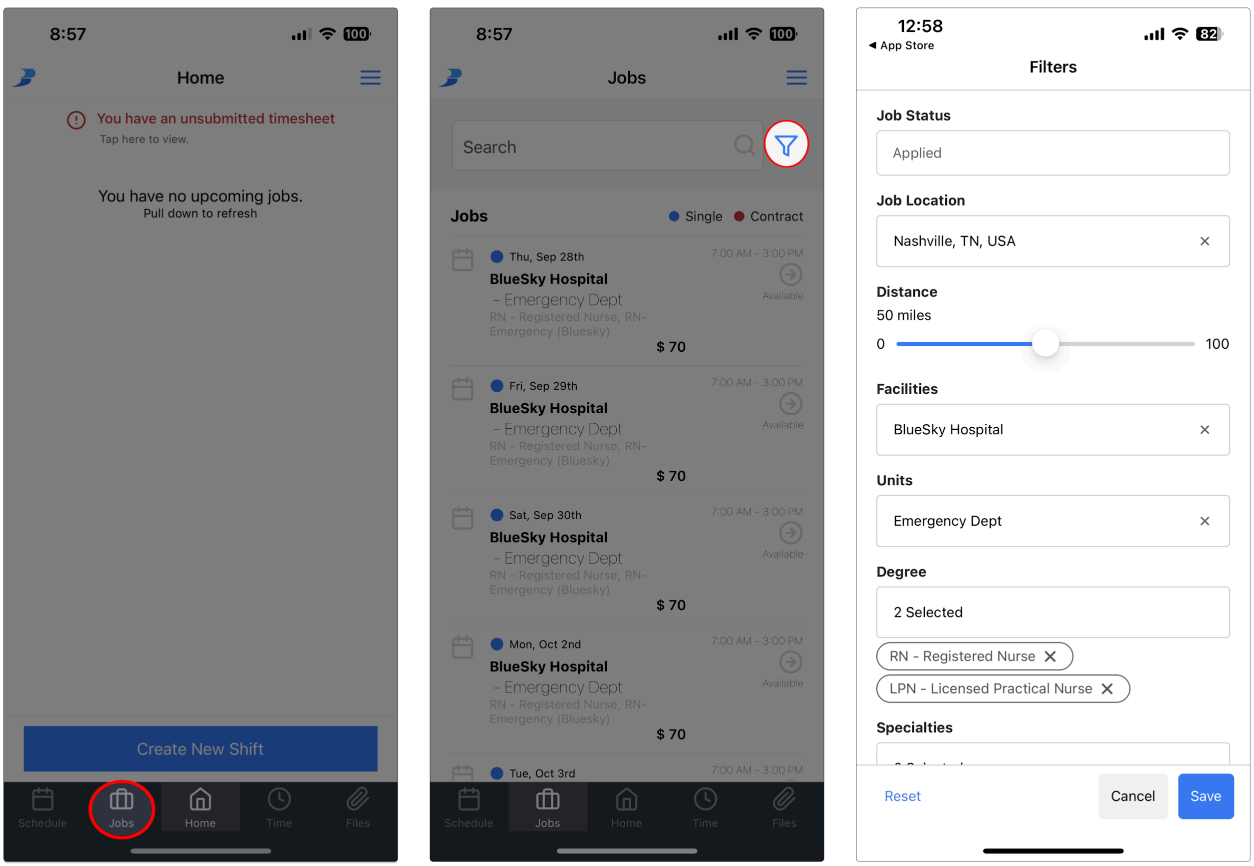


Figure 9: How to open the "Jobs" filter.

Confirming Shifts by Caregiver

Overview

This feature allows caregivers to acknowledge and confirm their assigned shifts. Once confirmed, the shift status will update to "Confirmed by Caregiver" in the web portal.

Note: For instructions on enabling or disabling this button, please see the permissions section of this guide.

Step-by-Step Guide

1. Tap on the Jobs tab at the bottom of the screen.
2. Click on the filter icon in the top right corner.
3. In the job status filter, choose Assigned (Unconfirmed).
4. Tap Save to activate the selected filter.
5. You will now see a list of shifts that need your confirmation.
6. Tap on a specific shift to view more details.
7. Once ready, tap "Confirm Job" to confirm the shift.

Hint: The caregiver web permission for "Confirm Shifts by Caregiver" must be enabled to confirm shifts in the mobile app. When this permission is turned off, caregivers will not see the "confirm shift" button.

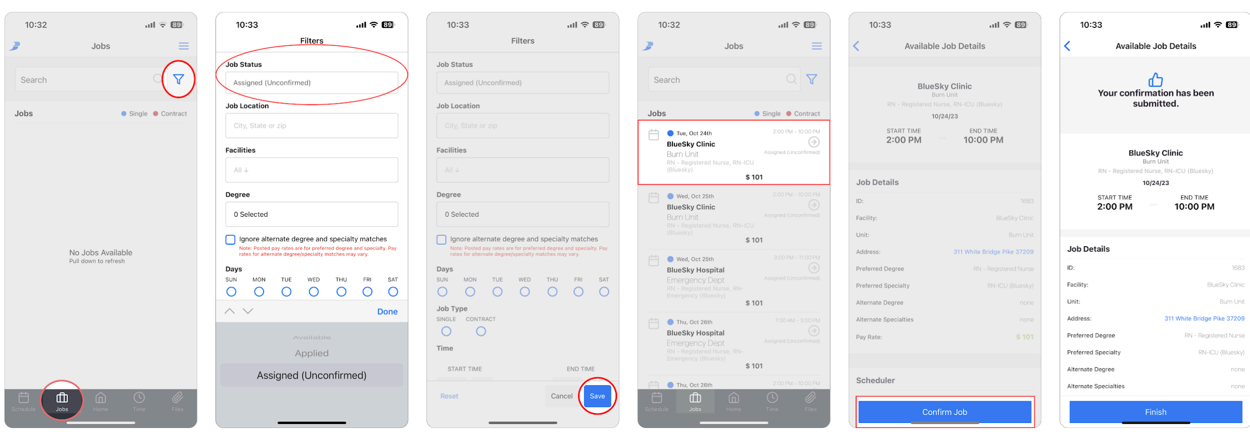


Figure 10: How to Confirm a Shift.

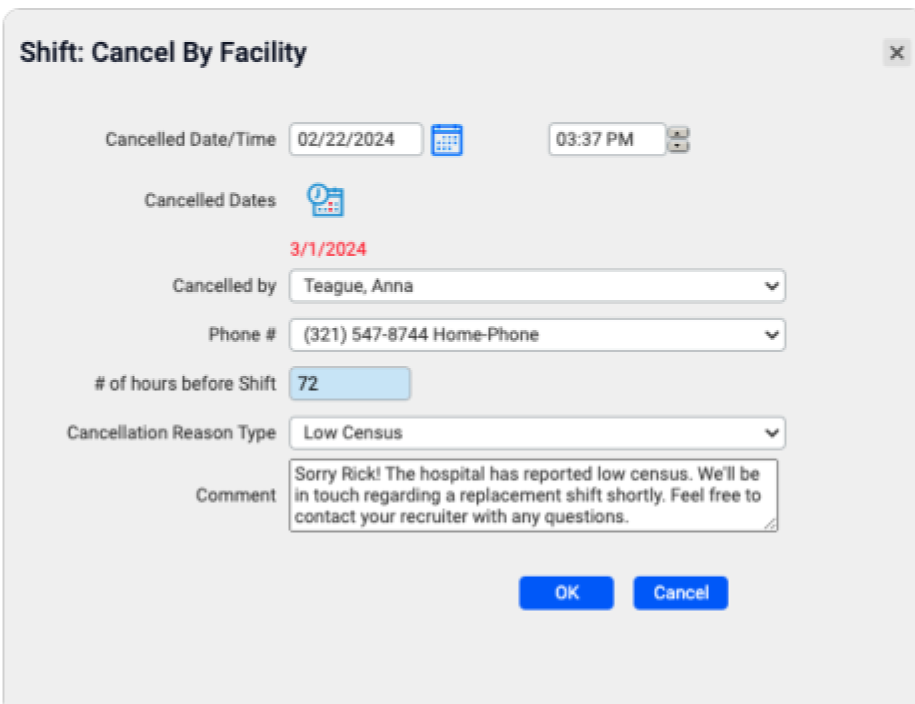
Viewing Cancelled Shifts

Overview

Cancelled shifts can be found under the Schedule section of the BlueSky mobile app. This area lists all shifts, including those that have been cancelled. For each cancelled shift, the following information will be displayed:

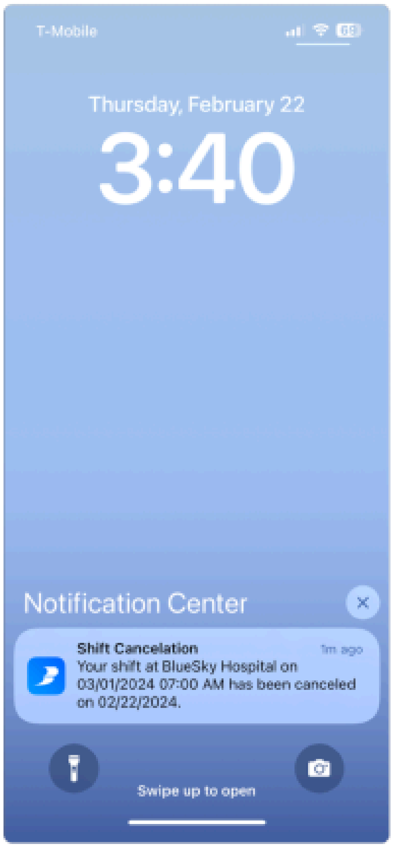
- **Cancellation Type**: Specifies the origin of the cancellation-identifying whether it was initiated by a caregiver, the facility, or the agency itself.
- **Cancelled On**: Indicates the exact date and time when the cancellation was processed.
- **Cancel Reason**: Displays the reason for cancellation as chosen from a predefined list in the cancellation menu.
- **Comments**: Provides space for any additional details or explanations regarding the cancellation.

When a cancellation is initiated by a company user through the web portal, the information is relayed to the caregiver in the mobile app, including the cancellation type, date, reason, and any comments.

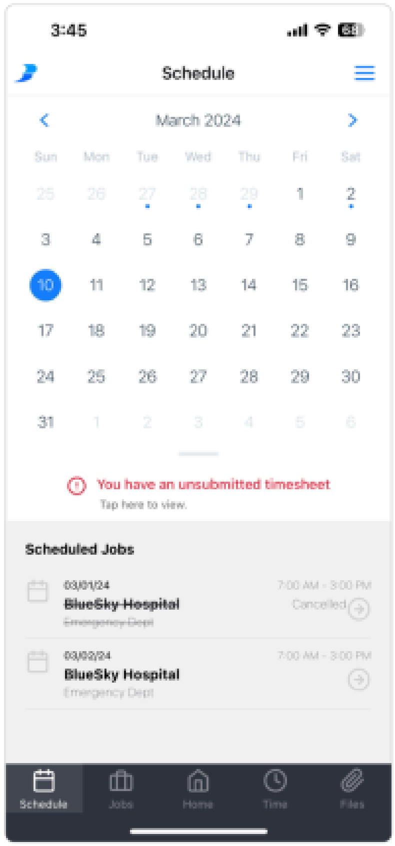


1. A company user initiates a cancellation in the web portal.

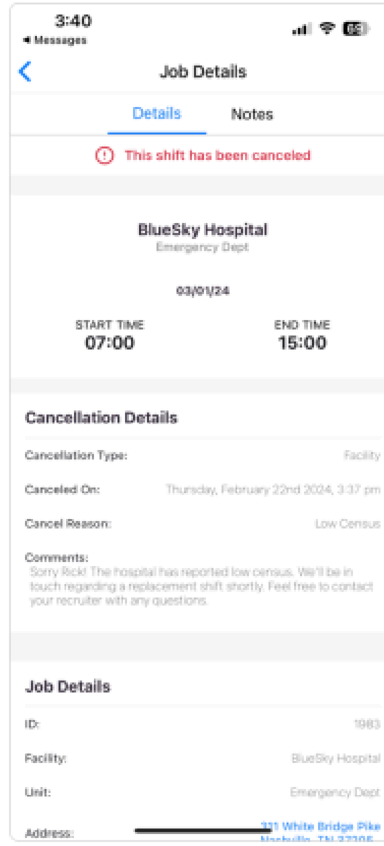
The cancellation triggers a push notification alert to the caregiver. The shift is marked as cancelled, indicated by the strikethrough formatting. Tapping a cancelled shift will open the detail view with additional information.



2. A push notification alerting the caregiver of the cancellation is sent.



3. The cancelled shift can be seen in the Schedule tab.



4. Tapping the shift will display the cancellation details from step 1.

Cancelling by Caregiver

Overview

Caregivers have the ability to cancel shifts directly through the mobile app, facilitated by a Cancel Shift button on the job details page. Once a shift is marked as cancelled, actions such as Start Timer and Edit Timesheet are disabled, with the shift details provided for informational purposes only.

> *Note: For instructions on enabling or disabling this button, please see the permissions section of this guide.*

Initial Setup

Company Admins have the option to customize the list of reasons a caregiver can select when cancelling a shift.

1. Navigate to Admin > Setup > System Lists.
2. Select “Cancel Reason by Caregiver” in the “System List” drop-down menu.
3. Customize the list of reasons as needed.

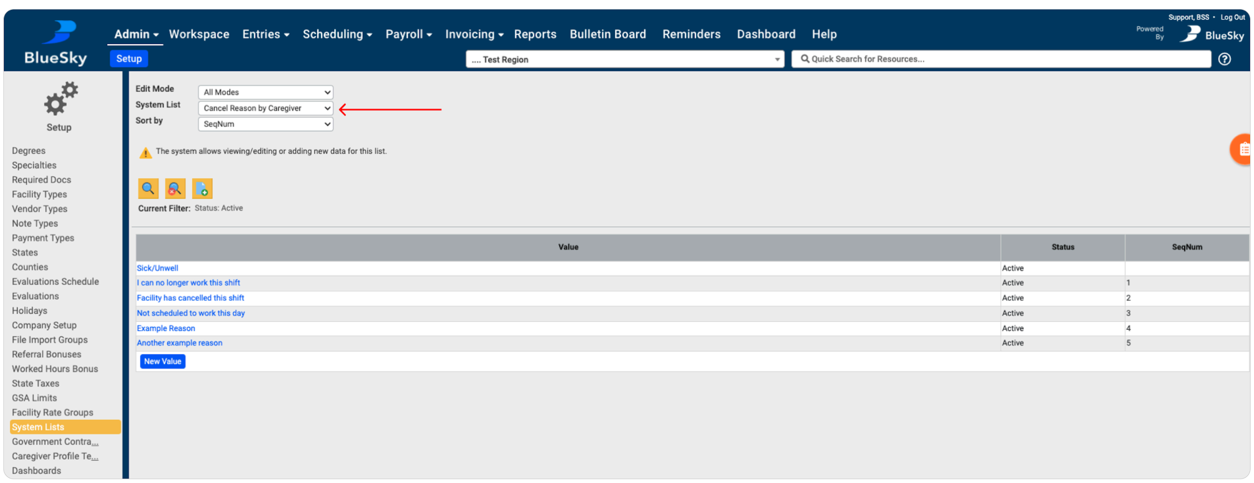
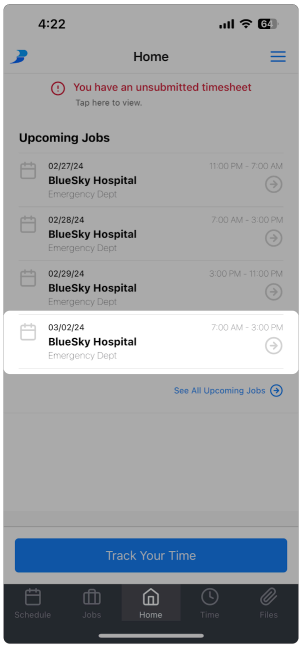


Figure 11: How to customize the caregiver cancellation reason list.

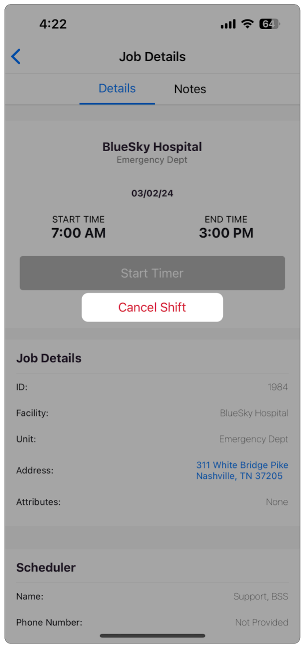
Step-by-Step Guide

1. **Log In**: Open the mobile app and sign in.
2. **Select a Shift**: Choose an upcoming or past shift (no more than 30 days old).
3. **Cancel the Shift:** Tap the "Cancel Shift" button.
4. **Choose a Reason**: From the dropdown, select a reason for the cancellation.
5. **Add Comments**: Optionally, enter any notes or comments in the "Comments" field.
6. **Confirm**: Tap "Confirm" to complete the cancellation process.

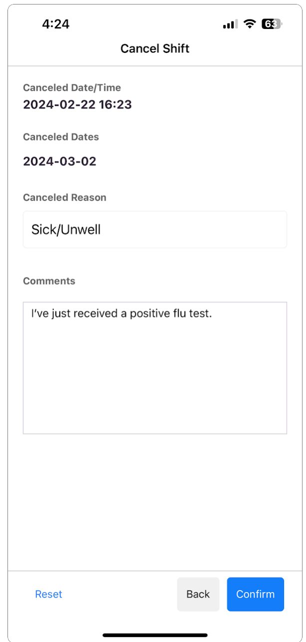
7. **Review**: To see your cancelled shifts, go to the Schedule tab.



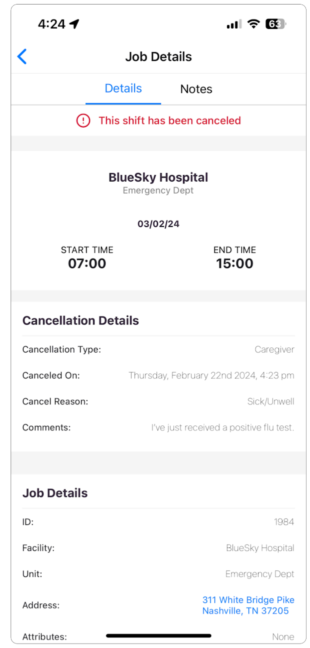
1. Select a shift



2. Tap the “Cancel Shift” button.



3. Select a reason and enter any comments.



4. Review the cancellation in the schedule tab.

Hint: Caregivers can cancel shifts up to 30 days after the scheduled start date, as long as they haven't submitted a timesheet for them.

Caregiver Profile Information

Overview

In the BlueSky Mobile app, caregivers can view and edit their general profile information when the appropriate permissions are enabled.

> *Note: For instructions on enabling or disabling these buttons, please see the permissions section of this guide.*

Step-by-Step Guide

1. Tap the three-line icon located in the top-right corner of the app to open the side menu.
2. Select "My Profile" from the menu to view your personal profile.
    1. Various categories of your profile (like Personal Info, Education, Work History, etc.) are available.
3. Tap on the category you wish to view or edit.
4. In the selected category, you can either update existing information or add new details.
5. Simply tap on the field you want to modify and enter the new information.

Hint: Each sub-section of the profile is governed by specific web permissions. These can be individually toggled to allow full access (view and edit), read-only (view only), or no access.

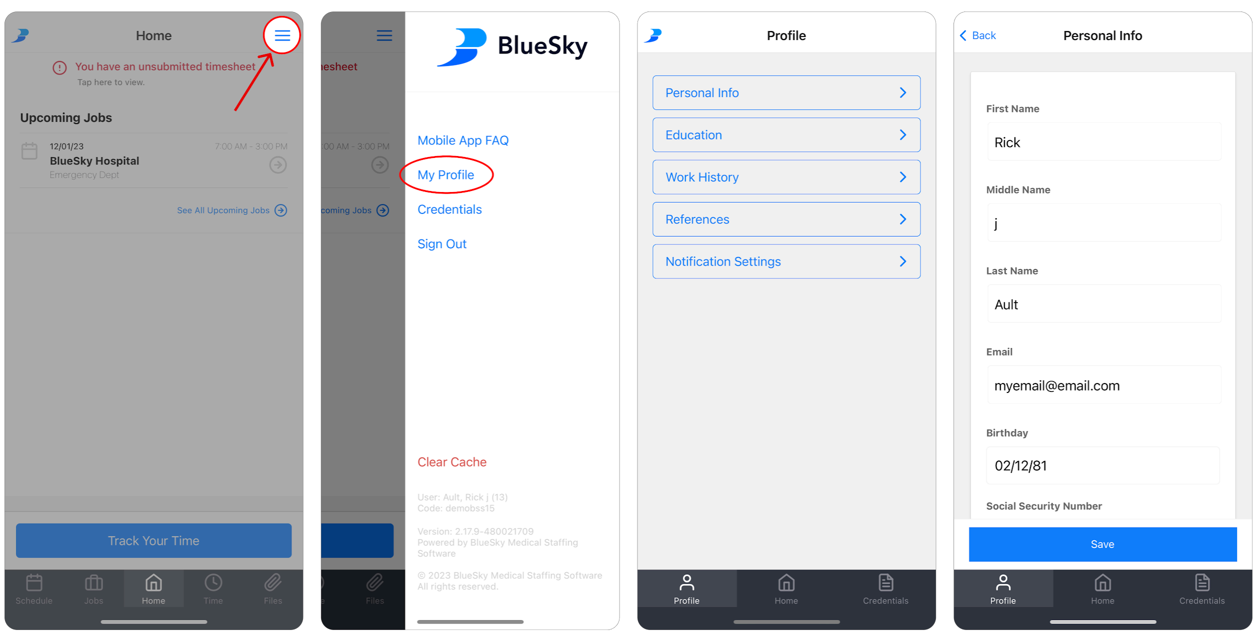


Figure 12: How to Edit Profile Information.

Required Documents

Overview

Caregivers can view, edit, and upload new required documents in the BlueSky Mobile App.

> *Note: For instructions on enabling or disabling these buttons, please see the permissions section of this guide.*

Step-by-Step Guide

1. Tap on the three-line menu in the top right corner of the screen.
2. Tap Credentials in the slide-out menu.
3. Tap State Licenses to view and edit license information or tap Other Required Documents to view all other documents.
4. Tap on a document to open the detail page.
5. When the appropriate permissions are set, caregivers can modify the following fields of a required document:
    1. Note
    2. Date Issued
    3. Expiration Date
    4. Attachment Upload

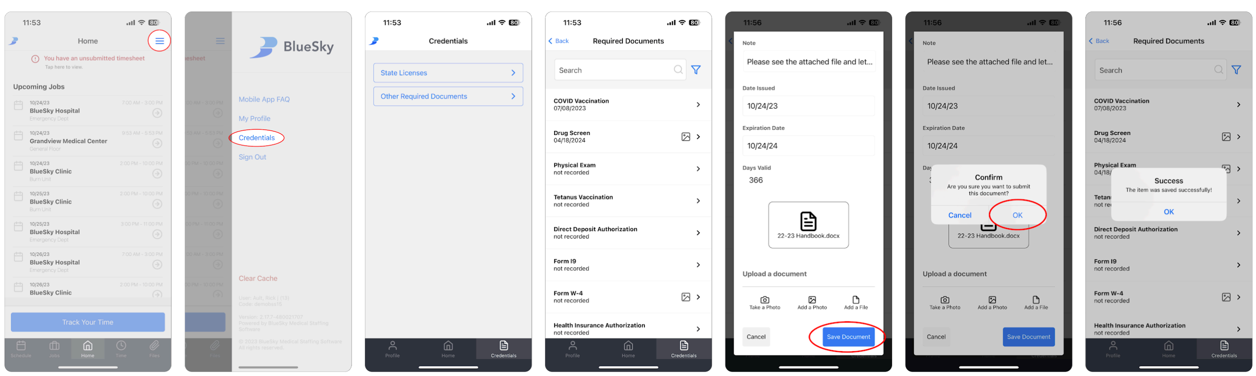


Figure 13: How to Edit a Required Document.

Submitting Payment & Expense Documentation

Overview

Caregivers can easily submit documentation for “Other Payments” through the mobile app. This section will cover the process of configuring payment types and guiding caregivers on submitting their documents properly.

> *Note: For instructions on enabling or disabling these buttons, please see the permissions section of this guide.*

Step-by-Step Guide

1. **Verify Payment Type Configuration**
    1. Navigate to: Admin > Setup > Payment Types.
    2. Select the desired payment type to open the detail menu.
    3. Ensure the “Show to Caregiver” checkbox is selected. This checkbox controls which payment types are displayed in the mobile app.

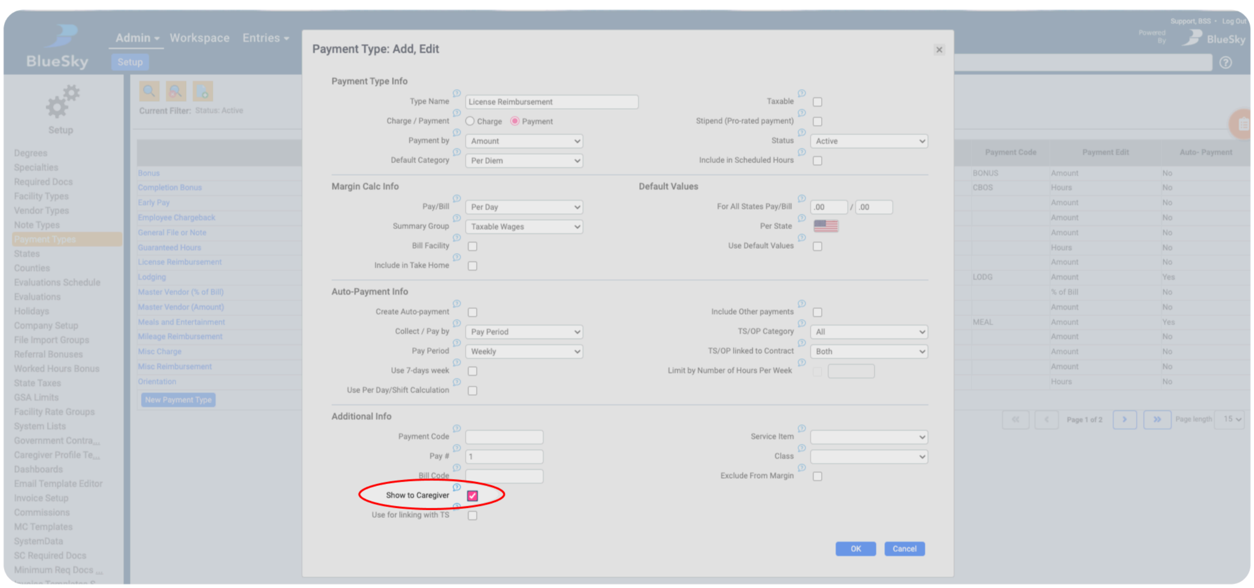


Figure 14: How to Show Other Payments in the Mobile App

2. **Accessing the Submission Form on Mobile**
    1. Open the mobile app and navigate to the "Files" tab.
    2. Select “Send File” to initiate the document submission process.
3. **Entering the Reimbursement Information**
    1. Select the appropriate payment type.
    2. Attach an image or file.

   3. Write a description or message in the textbox.
   4. Confirm that the "To" email address and subject are accurate, or edit them if needed.

4. **Tap “Compose” to launch your default email application.**
   1. Review your email and hit "Send."

Hint: The recipient email address is automatically retrieved from the "HR" email field specified in the "Company Setup" section. The email subject is automatically populated to include the payment type and date of submission.

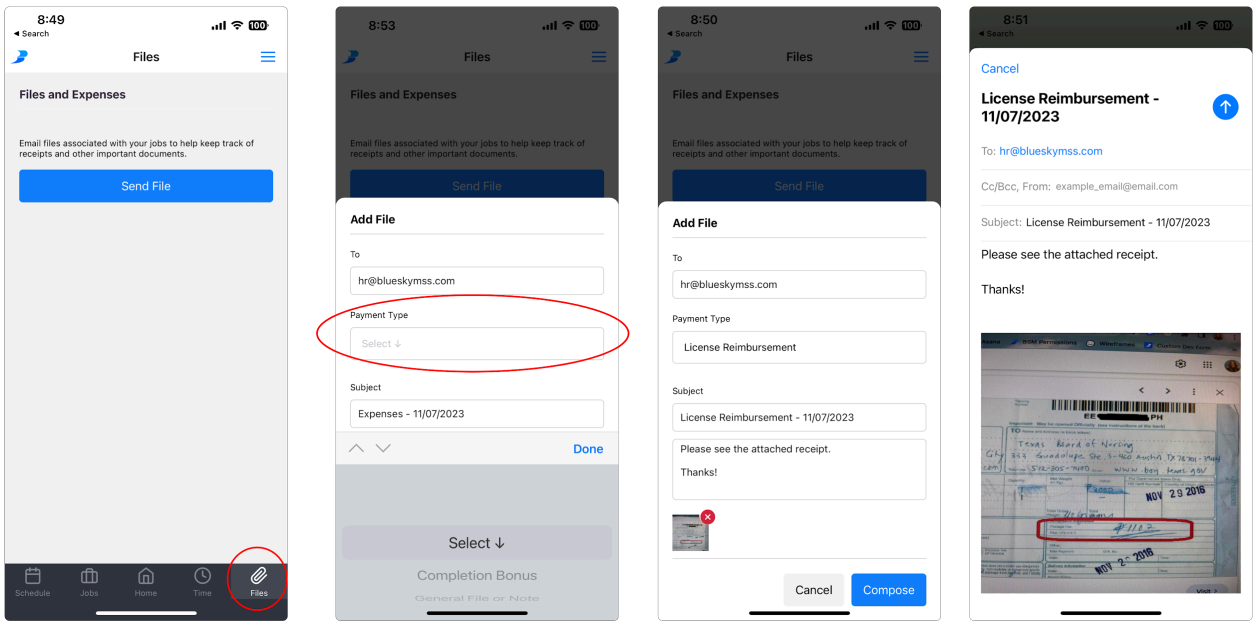
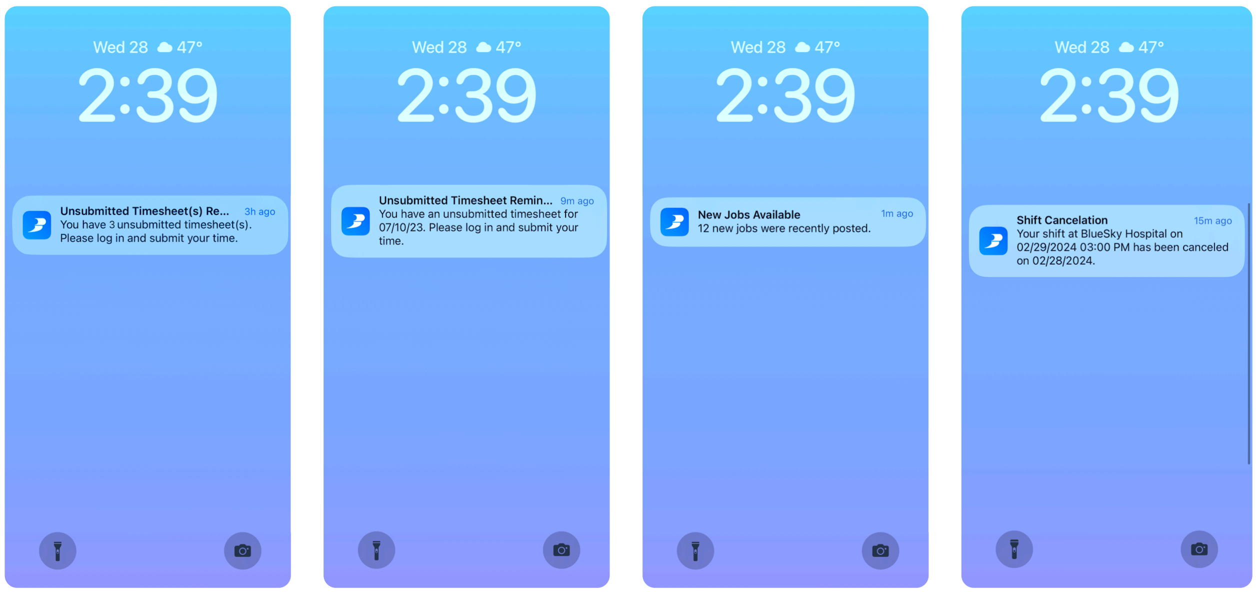


Figure 15: How to Submit Other Payments

Push Notifications

Overview

BlueSky Mobile's push notifications are tailored to assist caregivers in managing their notifications efficiently. The app offers several types of notifications for caregivers:



Summary Timesheet Reminder | *Unsubmitted Timesheet Reminder* | *New Jobs Available Alert* | *Shift Cancellation Alert*

Figure 16: Push Notification Examples

Unsubmitted Timesheet Reminders

These reminders are important for caregivers to stay updated on their timesheet submissions and come in two forms:

1. Individual Timesheet Reminders:
    1. These are sent if a caregiver’s timesheet remains unsubmitted one hour past the scheduled shift duration.
    2. Example: If a caregiver's shift is from 8 AM to 4 PM, and the timesheet is not submitted, a reminder will be sent at 5 PM.
2. Summary Timesheet Reminders:
    1. Every morning, caregivers receive a summary of all unsubmitted timesheets.

3. *Hint: Notifications for an unsubmitted timesheet will stop once the pay period is rolled forward by a BlueSky admin.*

New Jobs Available Notifications

These notifications keep caregivers informed about new, matching job opportunities:

- Updates are sent twice daily, at 9 AM and 5 PM.
- Each notification includes a recap of new job postings since the last update.

Cancelled Shift Notifications

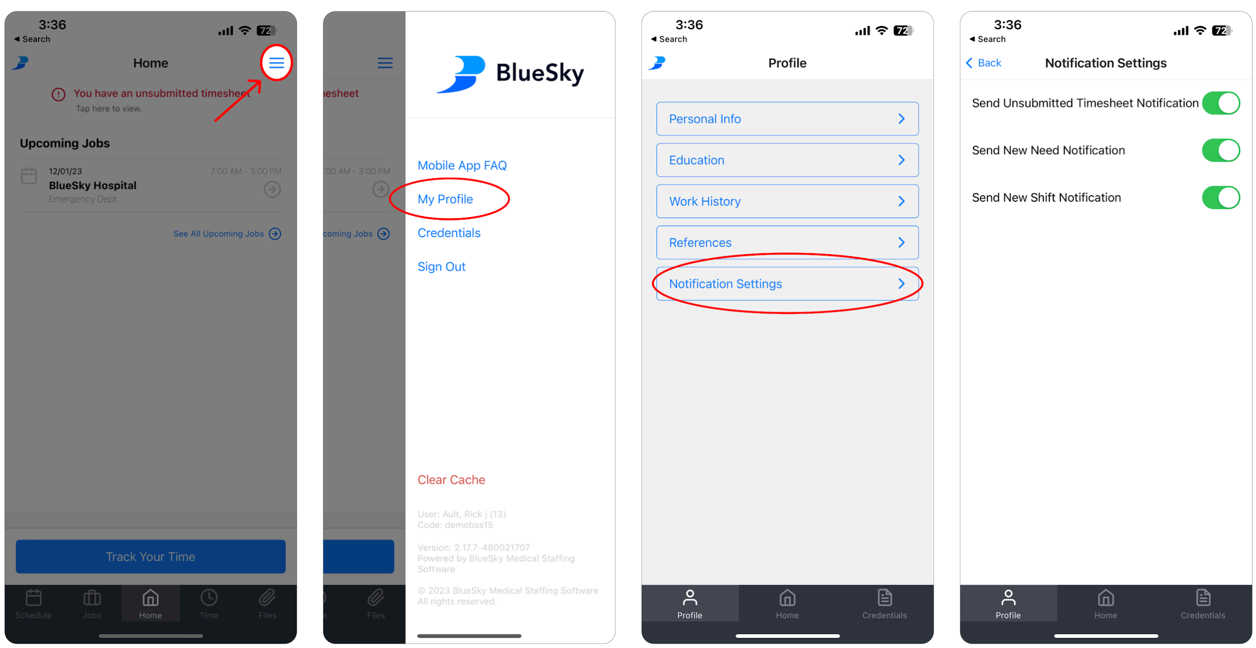
These notifications alert caregivers to any type of shift cancellation, ensuring they are immediately aware of changes to their schedules. Each notification includes the facility name, date, and start time of the cancelled shift, providing essential information at a glance.

When a caregiver receives a cancellation notification, tapping on it redirects them to a detail page within the app. This page offers further information about the cancellation, including the specific reason and any comments

Managing Notifications

Caregivers have the ability to personalize their notification experience by choosing which types of notifications they wish to receive. This customization can be achieved by turning specific notification types on or off according to their preferences. To adjust these settings, caregivers can follow the steps outlined below:

1. Tap the three-line menu in the top right corner.
2. Select "My Profile."
3. Select "Notification Settings."
4. Toggle on or off the desired types of notifications.



How to Toggle Push Notifications On or Off

Geofencing

Overview

The geofencing feature in the BlueSky Mobile app provides a simple yet effective way to ensure that caregivers are at the right place for their work. Using GPS technology, it creates a virtual boundary around each facility. When caregivers clock in, take breaks, or submit timesheets, the app checks if caregivers are within this boundary. If they're not, it alerts them and can automatically clock them out if they're away for too long.

Step-By-Step Guide:

Initial Setup:

1. **Contact BSS Support:** To enable geofencing, clients must first contact BSS Support (*support@blueskymss.com*) to activate this feature within the BlueSky Mobile app.
2. **Facility Setup:** Geofencing can be enabled for individual facilities. Each requested facility will undergo a verification process to confirm that the geo-coordinates match the physical address.
3. **Geofence Radius:** A geofence radius will be assigned for each facility, with a default setting of 500 feet.

For Caregivers:

1. Caregivers must ensure their BlueSky Mobile app is updated to the latest version.
2. The app performs a location check when a Caregiver attempts to clock in, confirming they are within the geofence.
    - If outside the geofence, the Caregiver receives an error message indicating they are not inside the geofence.
3. When a Caregiver clocks in following a break, the app checks if they are within the geofence.
    - An error message is displayed if the Caregiver is found outside the geofence.
4. The app verifies the Caregiver's location when submitting timesheets.
    - Caregivers outside the geofence at this time will see an error message.
5. Caregivers remaining outside of the geofence for over ten minutes will be automatically clocked out.

Hint: Caregivers must have adequate cellular reception to reliably send location data.

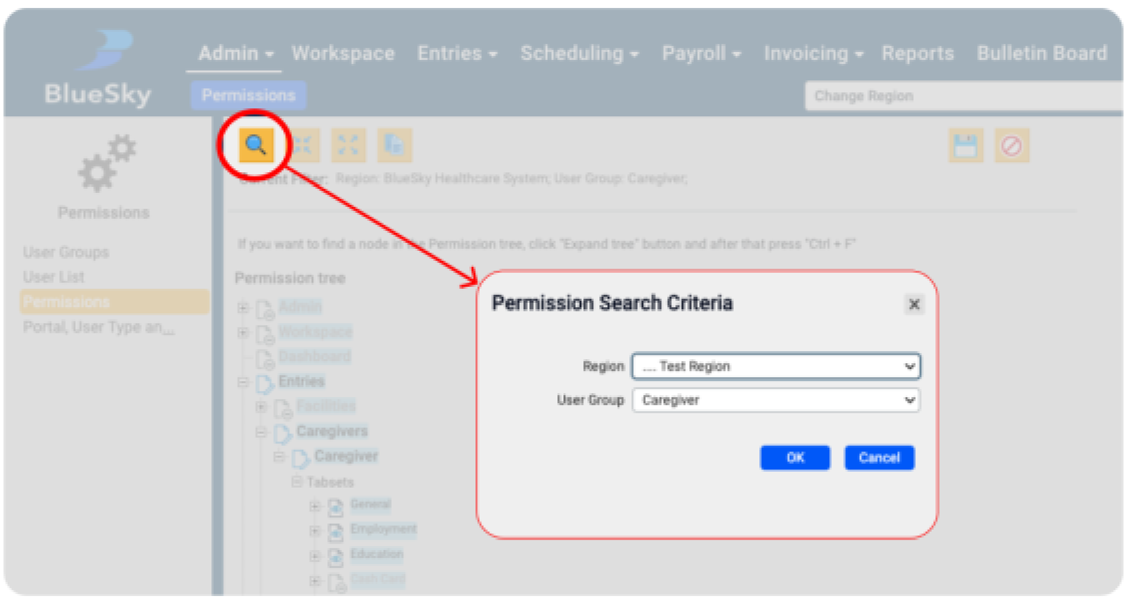
Mobile App Permissions

Overview

This section covers the permissions that correspond to optional features in BlueSky Mobile. Follow the steps below to toggle access to specific features in the mobile app.

Step-by-Step Guide

Before diving into specific permission settings, it's important to ensure that the correct region and user group are selected. Only permissions set for the "Caregiver" user group will influence the mobile app. In cases where there's a discrepancy between permissions set at the region-level and those at the company-level, the region-level permissions will take precedence. To select a region and user group, click on the filter icon located at the top of the page.



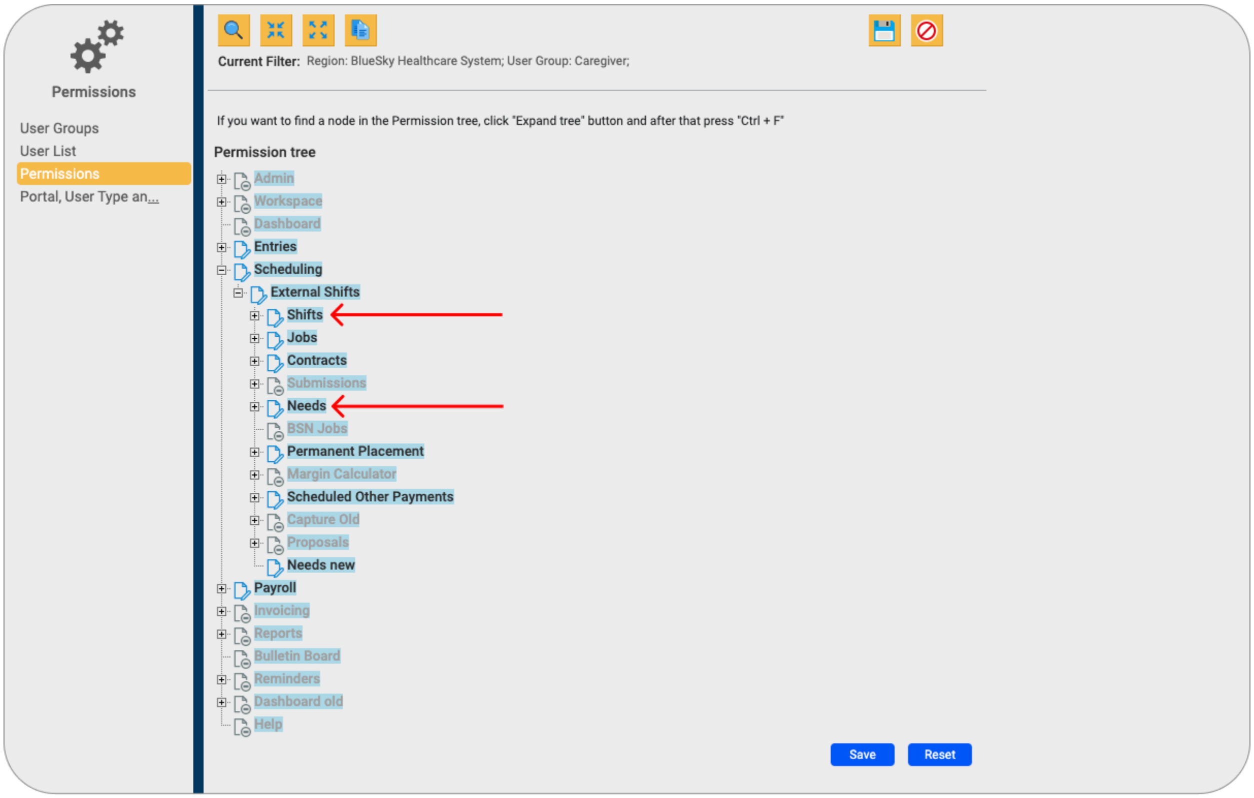
How to Set the Region and User Group

Controlling Access to Open Jobs

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the “Caregiver” user group.
4. Expand Scheduling > External Shifts.
    1. Click the Shifts permission.
    2. Choose “Full Rights” or “Not Accessible”

5. Again, in Permissions Tree, expand Scheduling > External Shifts
   1. Click the Needs permission.
   2. Choose “Full Rights” or “Not Accessible”
6. Click Save.

Hint: Both "Shifts" & "Needs" must be "accessible" to view jobs on the mobile app. An error page will show up otherwise.



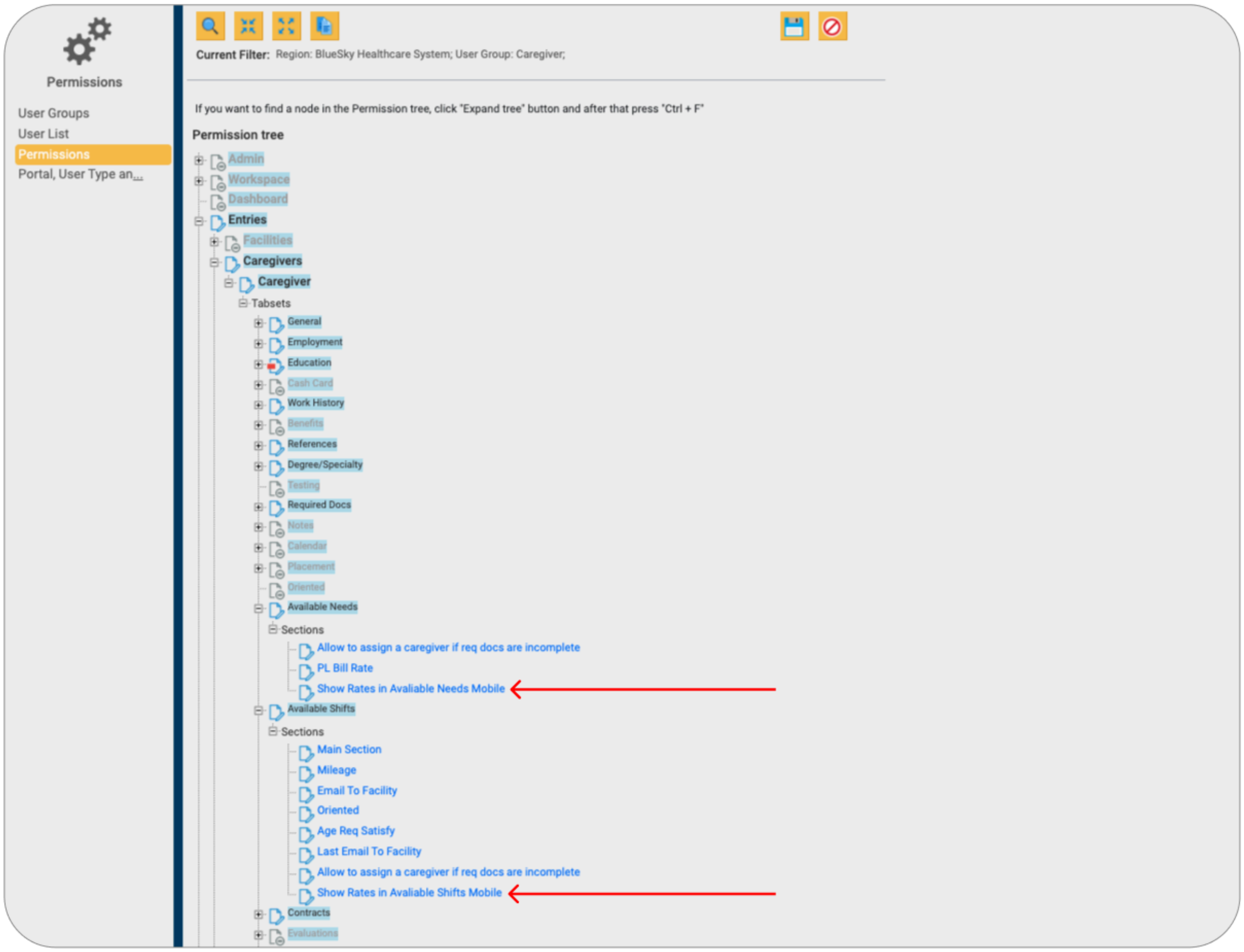
Permission settings to display open jobs.

Controlling Visibility of Pay Rates for Open Jobs

For Employees:

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left side menu and click on it to access the permission tree.
3. Select the desired region and select the “Caregiver” user group.
4. Expand Entries > Caregivers > Caregiver > Tabsets > Available Needs.
   1. Click the Show Rates in Available Needs Mobile permission.
   2. Choose "Full Rights" or "Not Accessible."

5. Expand Entries > Caregivers > Caregiver > Tabsets > Available Shifts.
    1. Click the Show Rates in Available Shifts Mobile permission.
    2. Choose "Full Rights" or "Not Accessible."
6. Click Save.

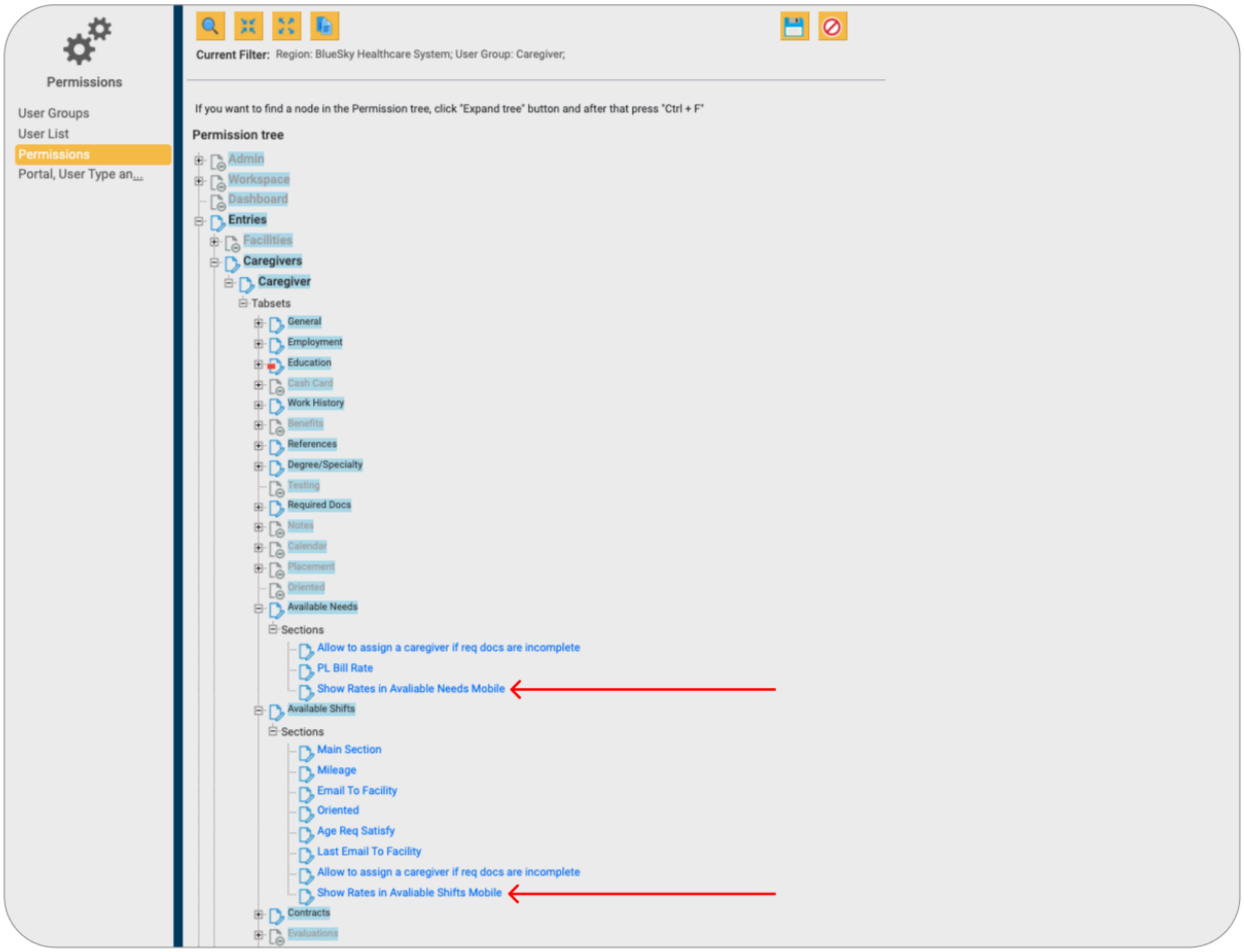


Permission settings for displaying rates for open shifts and/or needs to W2 employees.

For Subcontractors:

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the “Caregiver” user group.
4. Expand Entries > Subcontracting Companies > Tabsets > Caregivers > Available Needs
    1. Click the Show Rates in Available Needs Mobile permission.
    2. Choose "Full Rights" or "Not Accessible."
5. Expand Entries > Subcontracting Companies > Tabsets > Caregivers > Available Shifts.
    1. Click the Show Rates in Available Shifts Mobile permission.
    2. Choose "Full Rights" or "Not Accessible."

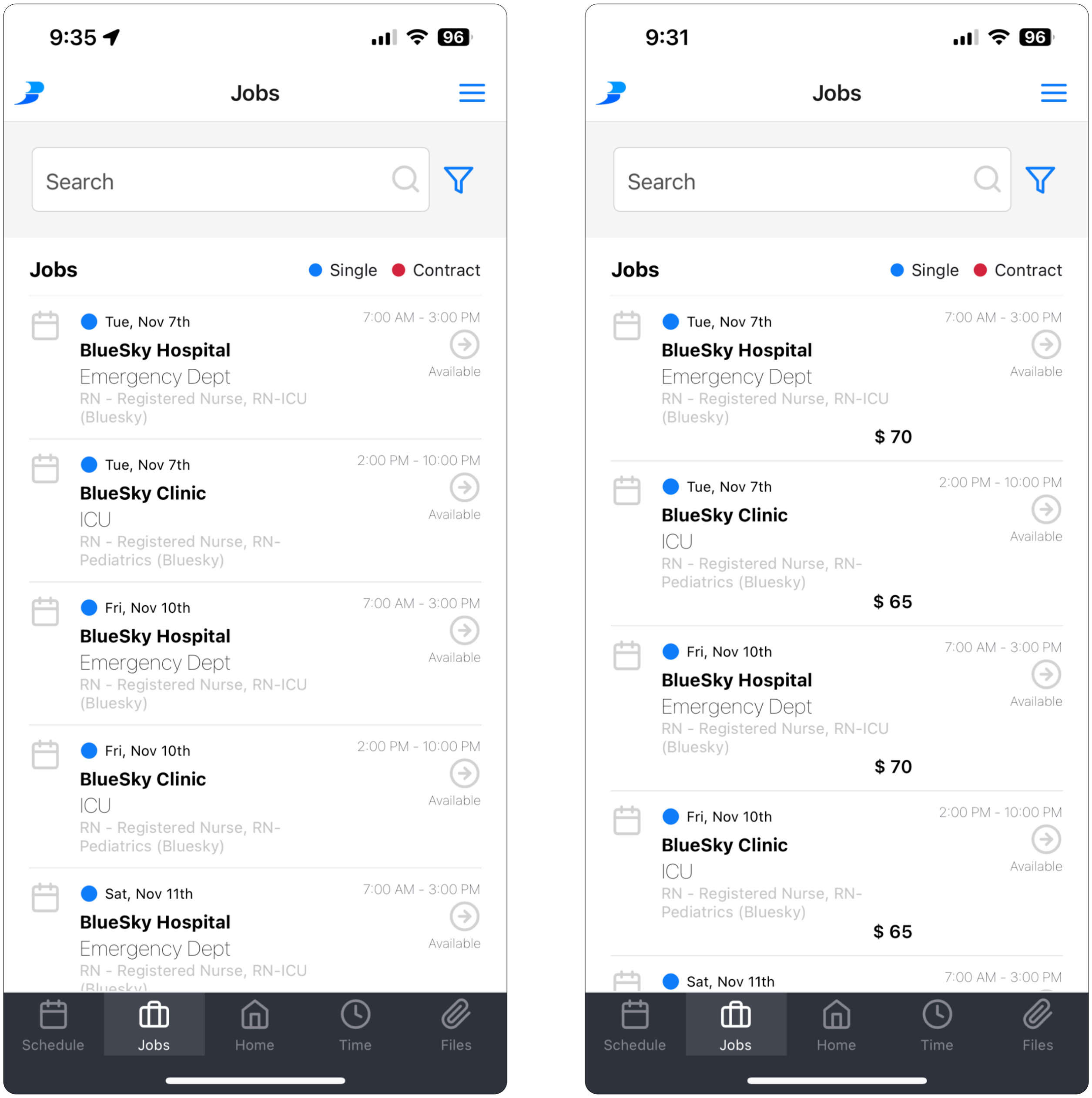
6. Click Save.



Permission settings for displaying rates for open shifts and/or needs to subcontractors.

Hint: Only base pay rates for the preferred degree and specialty are displayed; specialty rates for overtime, holidays, and weekends are not reflected in the app. The base rate is determined based on the rate heirarchy below:

1. *Shift level rate (if entered)*
2. *Unit level rate (if found)*
3. *Facility level rate (if found)*
4. *Caregiver level rate (if none of the above were found)*



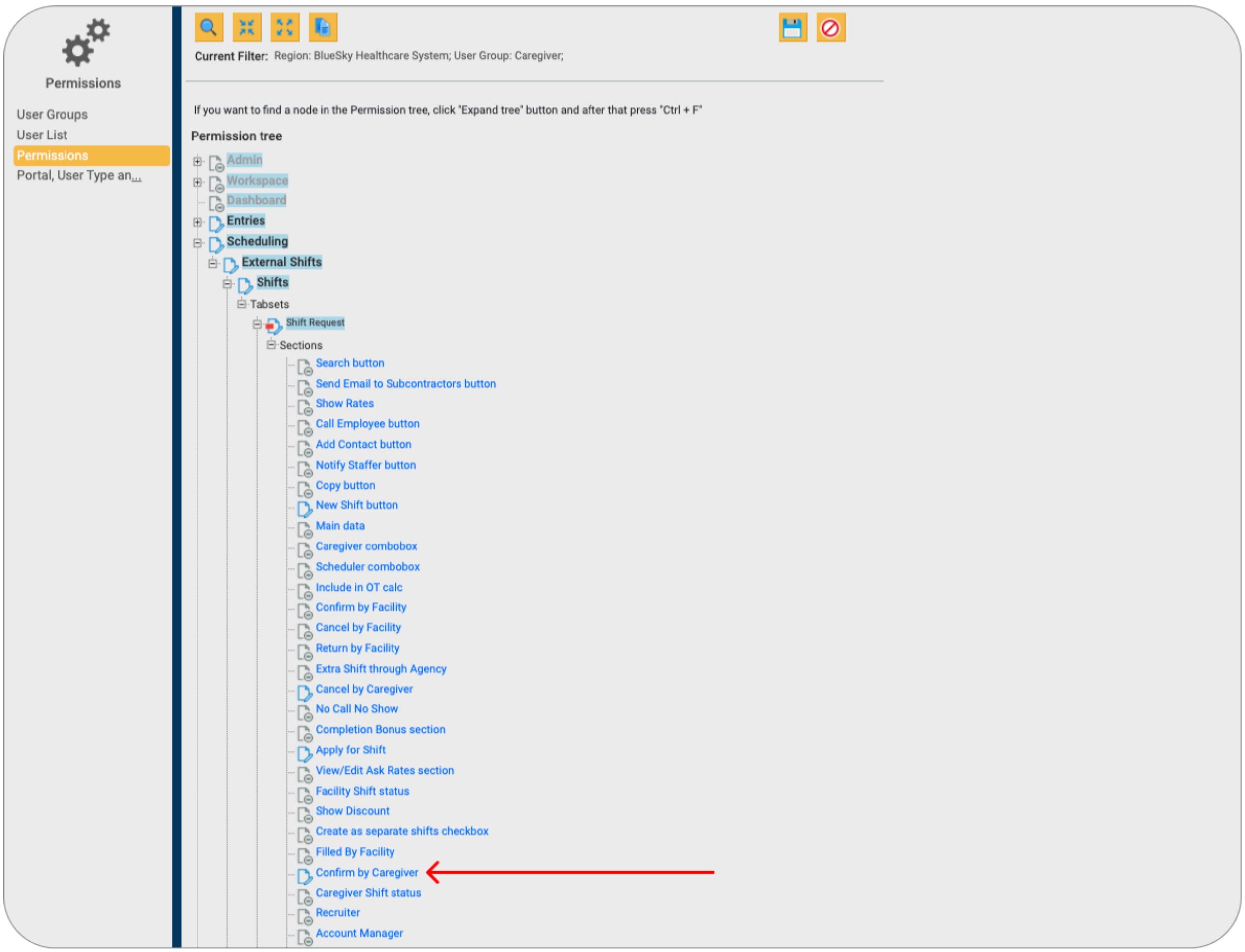
Displaying or Hiding Rates for Open Jobs.

Allowing Caregivers to Confirm Shift Assignments

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the “Caregiver” user group.

4. Expand Scheduling > External Shifts > Shifts > Tabsets > Shift Request > Sections.
    - Click the Confirm by Caregiver permission.
    - Choose “Full Rights” or “Not Accessible.”
5. Click Save.

Hint: Within the mobile app's "Jobs" tab, caregivers can modify the job filter to see their "Assigned (Unconfirmed)" jobs. Selecting a job from this list will show its details along with a "Confirm" button. Once pressed, these jobs will be marked as "Confirmed by Caregiver."



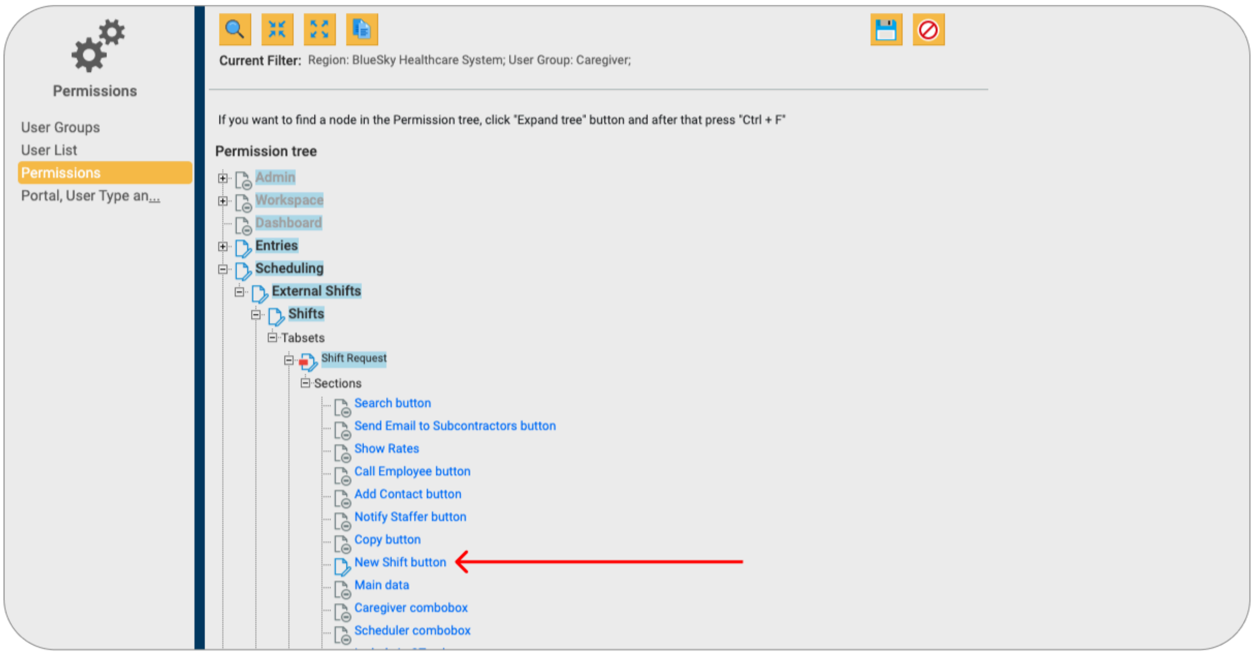
Permission settings for the "Confirm by Caregiver" button.

Allowing Caregivers to Create New Shifts (Ad-Hoc Timesheets)

Create New Shift Button:

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.

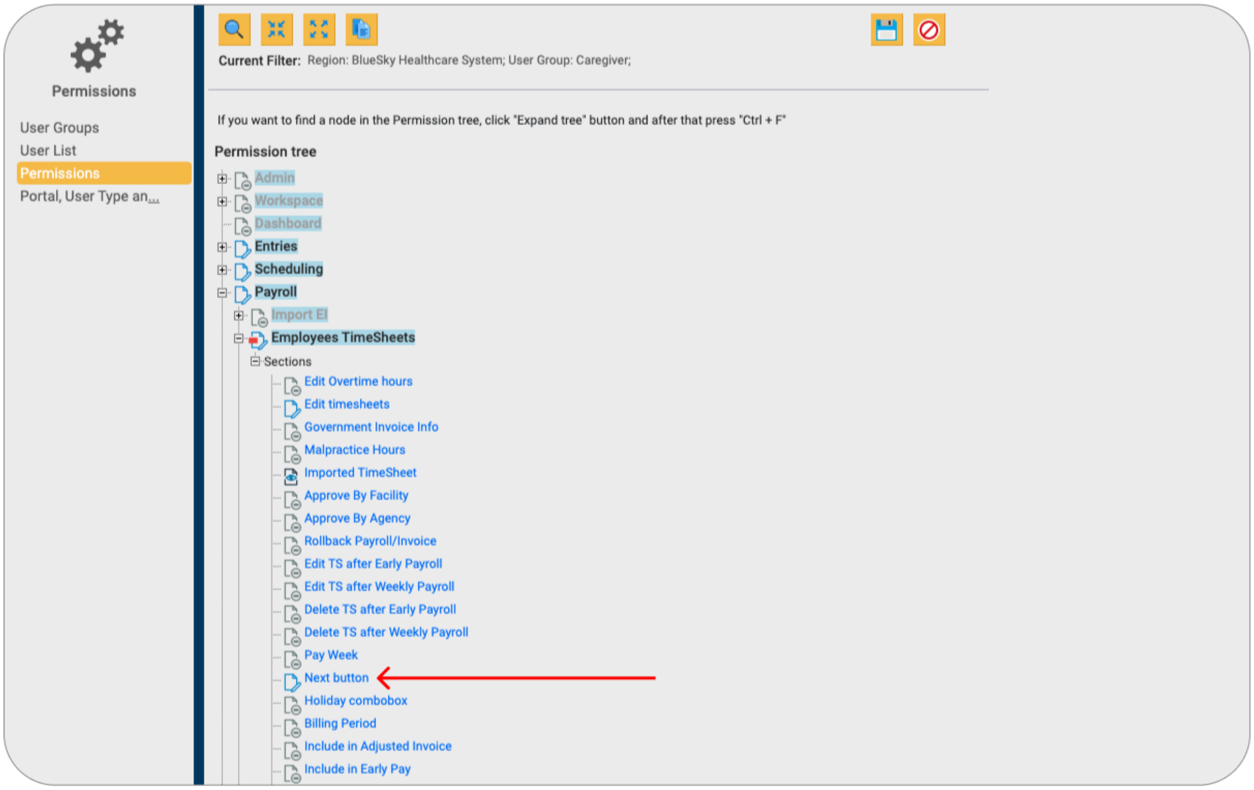
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the “Caregiver” user group.
4. Expand Scheduling > External Shifts > Shifts > Tabsets > Shift Request > Sections.
    1. Click the New Shift Button permission.
    2. Choose "Full Rights" or "Not Accessible."
5. Click Save to apply your changes.



Permission settings for the "Create New Shift" button.

Create New Timesheet Button:

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the Caregiver user group.
4. For W2 Caregivers:
    - Expand Payroll > Employees Timesheets > Sections > Next Button.



Permission Settings for the "Create New Timesheet" button for W2 employees.

5. For Subcontracting Caregivers:
    - Expand Payroll > SC Timesheets > Sections > Next Button.

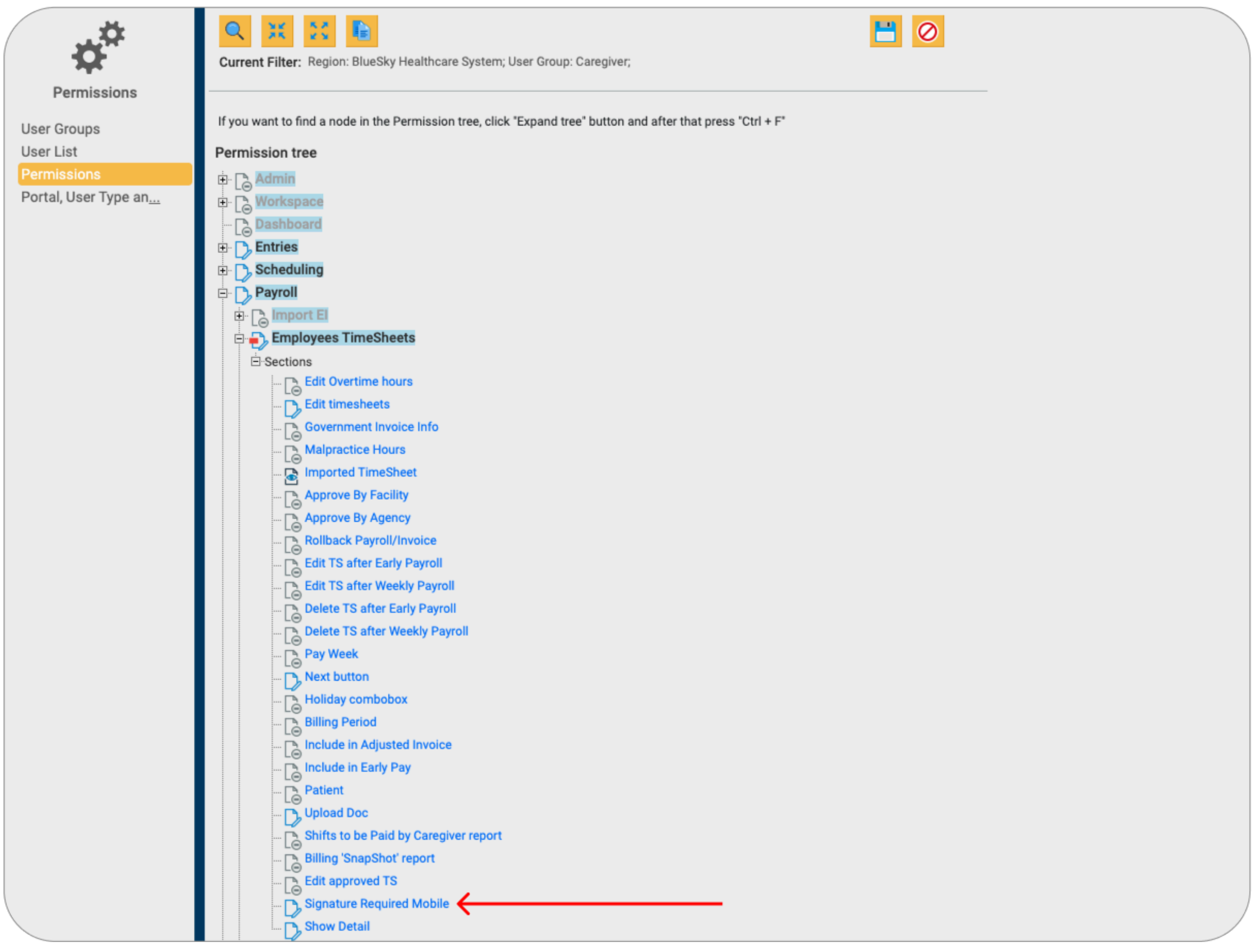
Permission settings for the "Create New Timesheet" button for subcontractors.

6. Choose "Full Rights" or "Not Accessible."
7. Click “Save” to apply your changes.

Hint: The "Create New Shift" and "Create New Timesheet" buttons permit caregivers to enter timesheets and shifts not scheduled by a BlueSky admin. Enable this permission to allow caregivers to self-report their work hours rather than submitting time for pre-scheduled shifts.

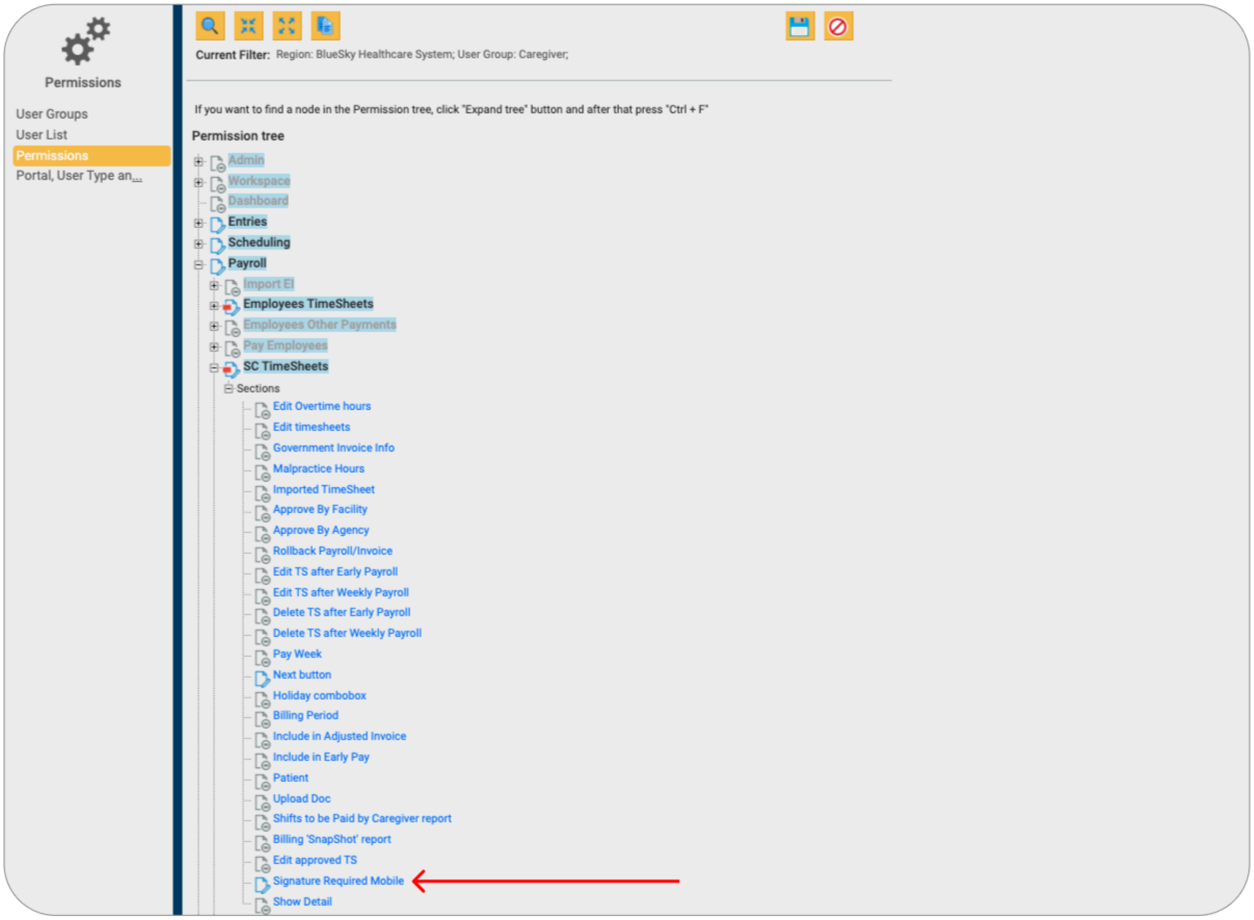
Requiring a Manager's Signature on Timesheets

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the Caregiver user group.
4. For W2 Employees:
   - Expand Payroll > Employee Timesheets > Sections.
   - Click Signature Required Mobile



Permission settings to require a signature or attachment on timesheets for W2 employees.

5. For Subcontractors:
   - Expand Payroll > SC Timesheets > Sections.
   - Click Signature Required Mobile



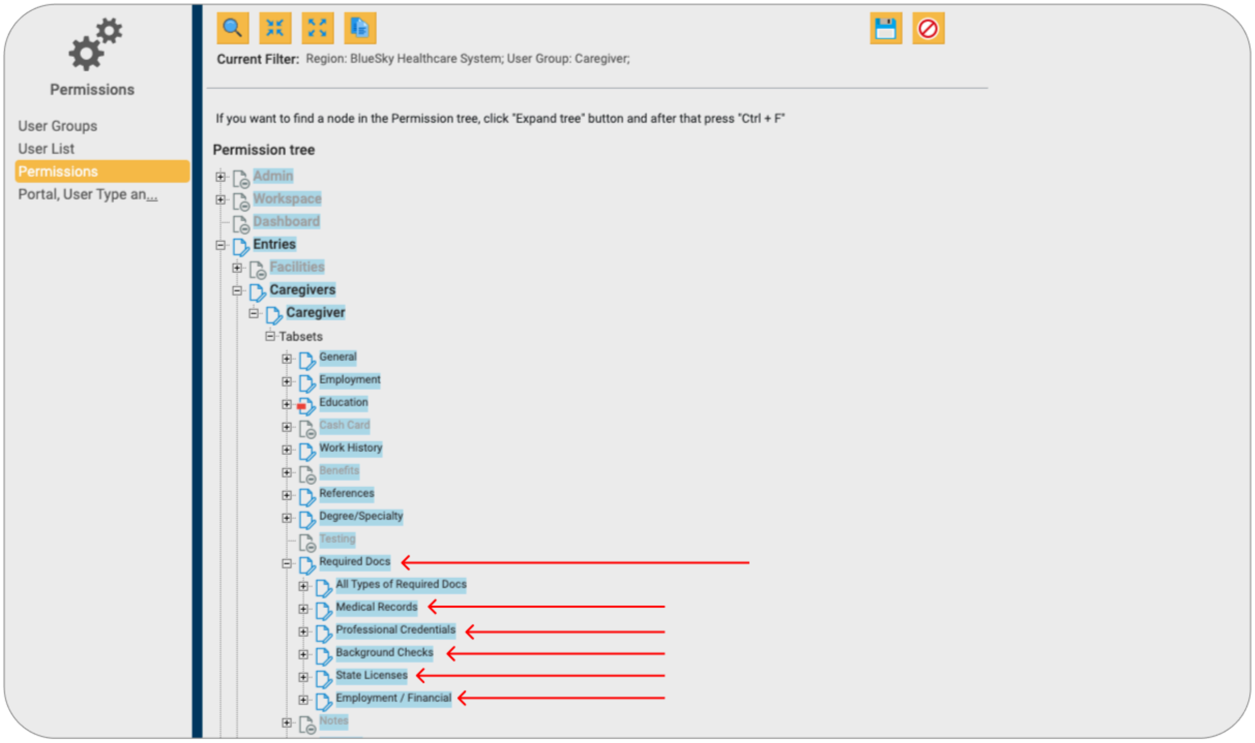
Permission settings to require a signature or attachment on timesheets for subcontractors.

6. Choose "Full Rights" or "Not Accessible"
7. Click Save.

Hint: Caregivers always have the option to add a manager's signature or an image (either of the actual timesheet or another pertinent visual) when they submit timesheets. However, by adjusting this permission, a signature attachment can be made mandatory.

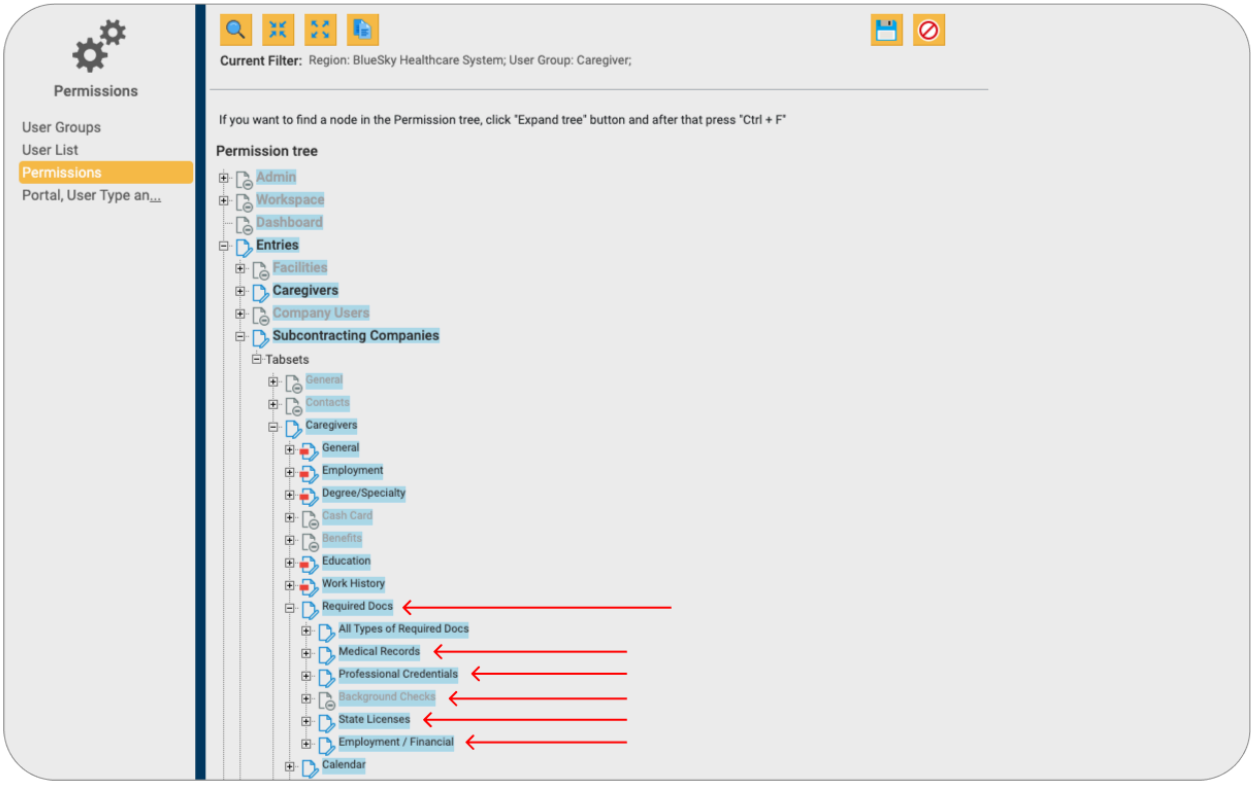
Controlling Access to Required Documents

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the Caregiver user group.
4. For W2 Employees:
   - Expand Entries > Caregivers > Caregiver > Tabsets > Required Docs.



Permission settings for required document categories for W2 employees.

5. For Subcontracting Employees:
    - Expand Entries > Subcontracting Companies > Tabsets > Caregivers > Required Docs.



Permission settings for required document categories for subcontractors.

6. The following document categories can be individually adjusted:
    - Medical Records
    - Professional Credentials
    - Background Checks
    - State Licenses
    - Employment / Financial
7. For each category, one of the following access levels can be designated:
    - **Not Accessible**: Caregivers will be unable to see these documents.
    - **Read Only**: Caregivers can view, but not modify or upload attachments.
    - **Full Access**: Caregivers can view, edit, and upload new and existing documents.

Hint: The document category for "All Types of Required Docs" is a web-specific permission and does not impact the mobile app. To disable access to all required docs in the mobile app, adjust the top-level permission titled "Required Docs."

Controlling Access to Caregiver Profile Information

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the Caregiver user group.
4. **For W2 Employees**:
    1. Expand Entries > Caregivers > Caregiver > Tabsets.

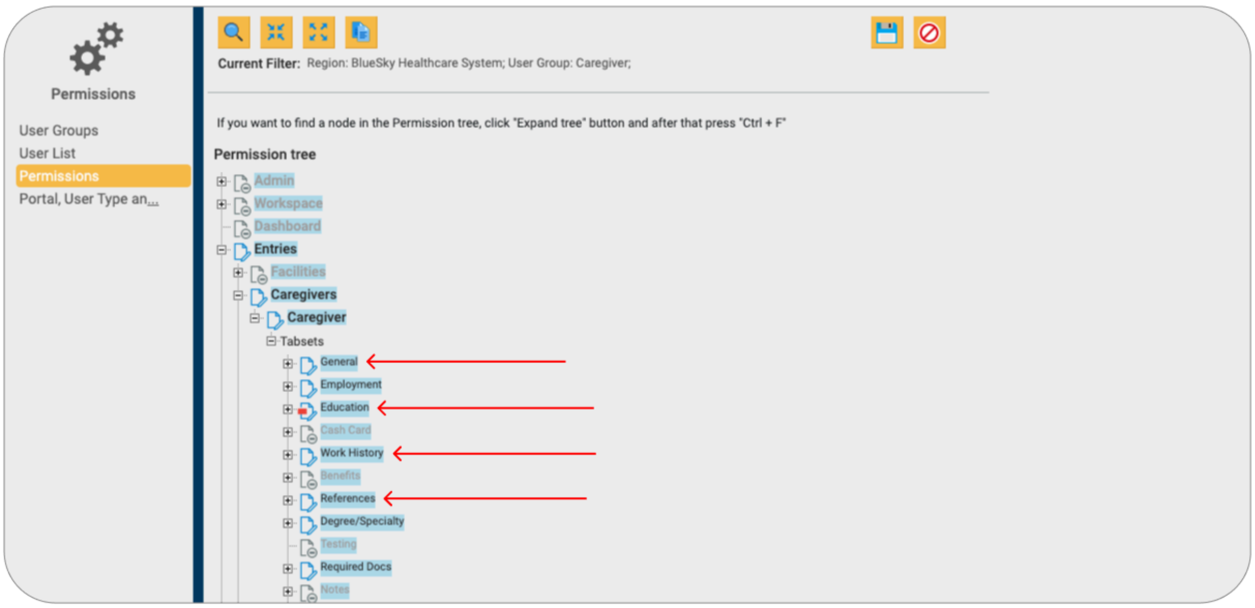
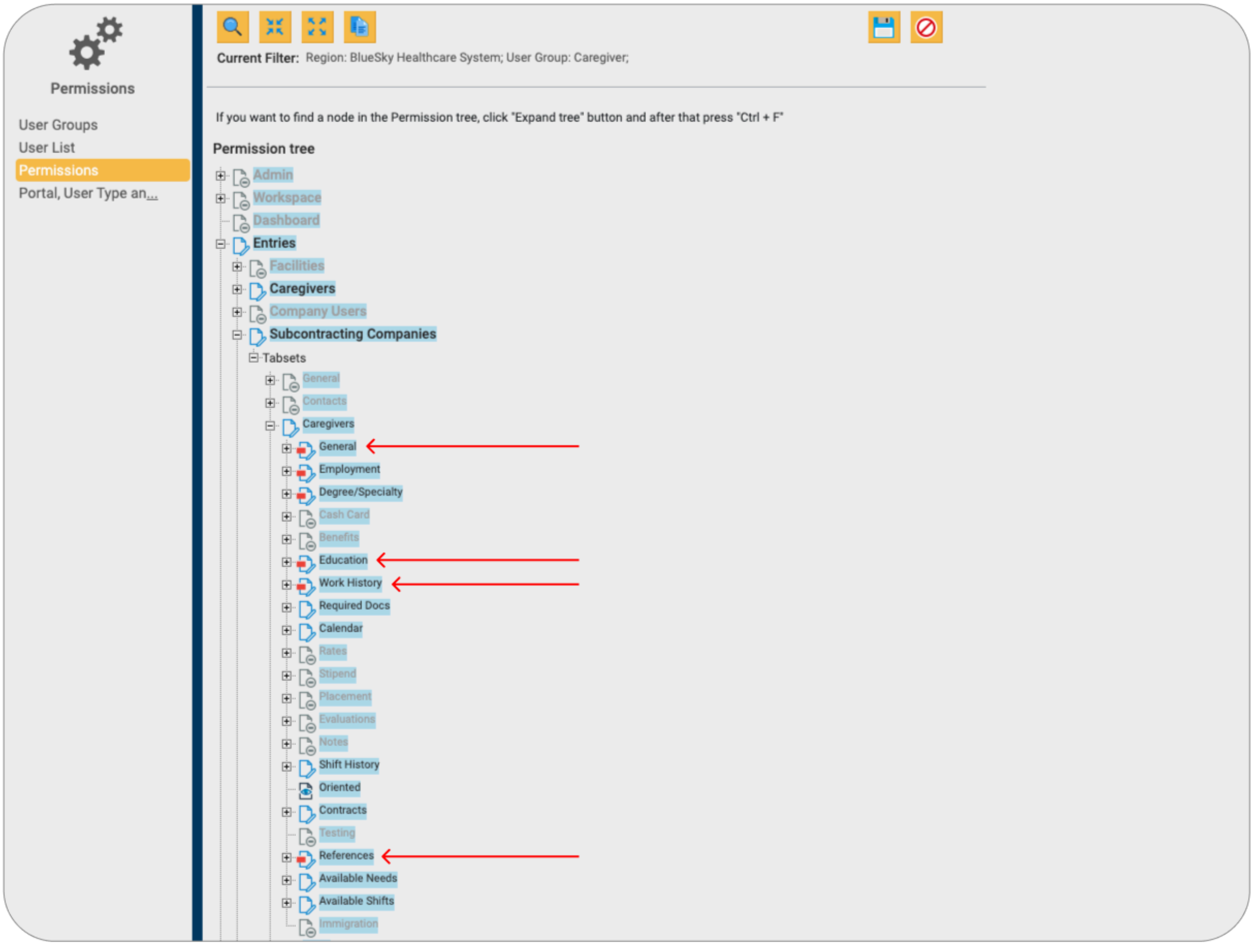


Figure 31: Permission settings for caregiver profile categories for W2 employees.

5. **For Subcontractors:**
    1. Expand Entries > Subcontracting Companies > Tabsets > Caregivers.



Permission settings for caregiver profile categories for subcontractors.

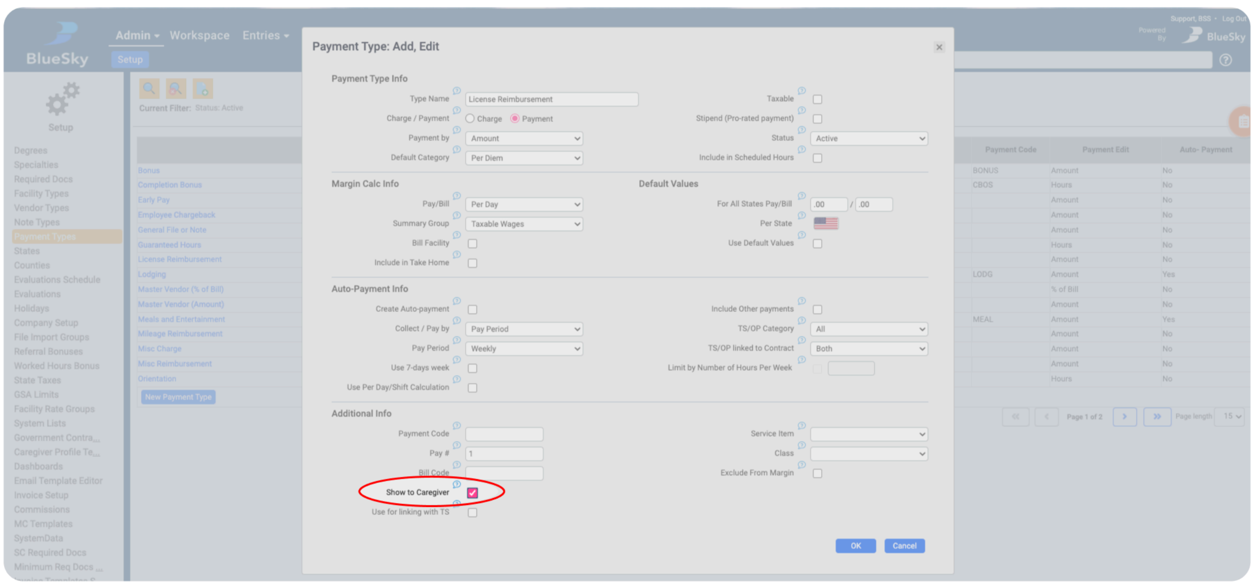
6. The following profile areas can be individually adjusted:
    1. General
    2. Education
    3. Work History
    4. References
7. For each category, one of the following access levels can be designated:
    1. **Not Accessible**: Caregivers cannot view this section.
    2. **Read Only**: Caregivers can view, but not modify or upload attachments.
    3. **Full Access**: Caregivers can view, edit, and upload new and existing records.

Hint: If a profile section is set to “Not Accessible,” caregivers will receive an error message when attempting to access it in the app.

Configuring Payment Type Access for Caregivers

1. Navigate to "Admin" in the top menu bar, and select "Setup" from the drop-down menu.
2. Once in the Setup section, locate "Payment Types" in the left-side menu and click on it to access the payment type list.
3. Choose a Payment Type in the grid.
4. Enable the Show to Caregiver checkbox to make it visible in the mobile app.
5. Click Save.

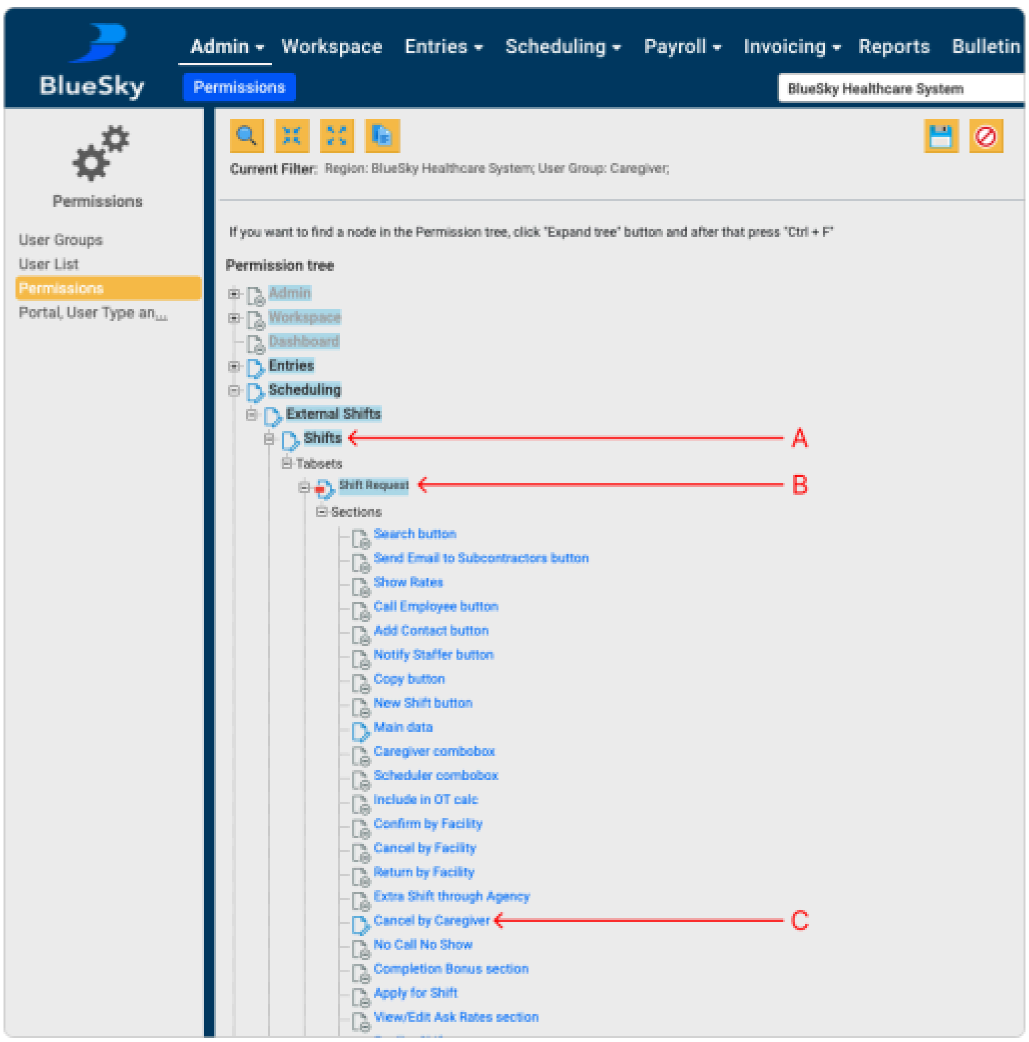
Hint: Caregivers can submit expense documents through the mobile app for company users to upload into BlueSky. To do this, navigate to the "Files" tab in the app, where you'll find the available Payment Types for document submission.



How to Display an Other Payment in the Mobile App.

Controlling Access to Cancel By Caregiver Functionalities

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Select the desired region and select the Caregiver user group.
4. Enable each of the following permissions:
    1. Scheduling > External Shifts > Shifts must be configured to either "Read Only" or "Full Rights".
    2. Scheduling > External Shifts > Shifts > Tabsets >Shift Request must be set to at least "Partial Access," though "Full Rights" is also acceptable.
    3. Scheduling > External Shifts > Shifts > Tabsets > Shift Request > Sections > Cancel by Caregiver must be set to “Full Rights” to display the "Cancel Shift" button.



Cancel by Caregiver Permission Settings

Controlling Visibility of Shift "Comment" Field

1. Navigate to "Admin" in the top menu bar, and select "Permissions" from the drop-down menu.
2. Once in the Permissions section, locate "Permissions" in the left-side menu and click on it to access the permission tree.
3. Expand the following sections: Scheduling > External Shifts > Shifts > Tabsets > Shift Request > Sections.
4. Locate the “Comment” permission in this section and click on it.
5. Choose “Full Rights” to make the Shift Comments visible in the app, or select “Not Accessible” to hide them.
6. Click “Save” to update the permission settings.

Troubleshooting Common Issues

General Troubleshooting

Overview

To address common issues within the BlueSky Mobile App, a series of straightforward troubleshooting steps are recommended. These actions can quickly remedy many of the typical challenges encountered by users.

Troubleshooting Steps

1. **Log Out of the App:**
    1. Tap the three-line menu icon in the top right corner.
    2. Select "Sign Out" from the menu options.
2. **Update the App:**
    1. Check for updates by visiting the app store.
    2. Confirm the app version number at the bottom of the login screen or in the app's slide-out menu if already logged in.

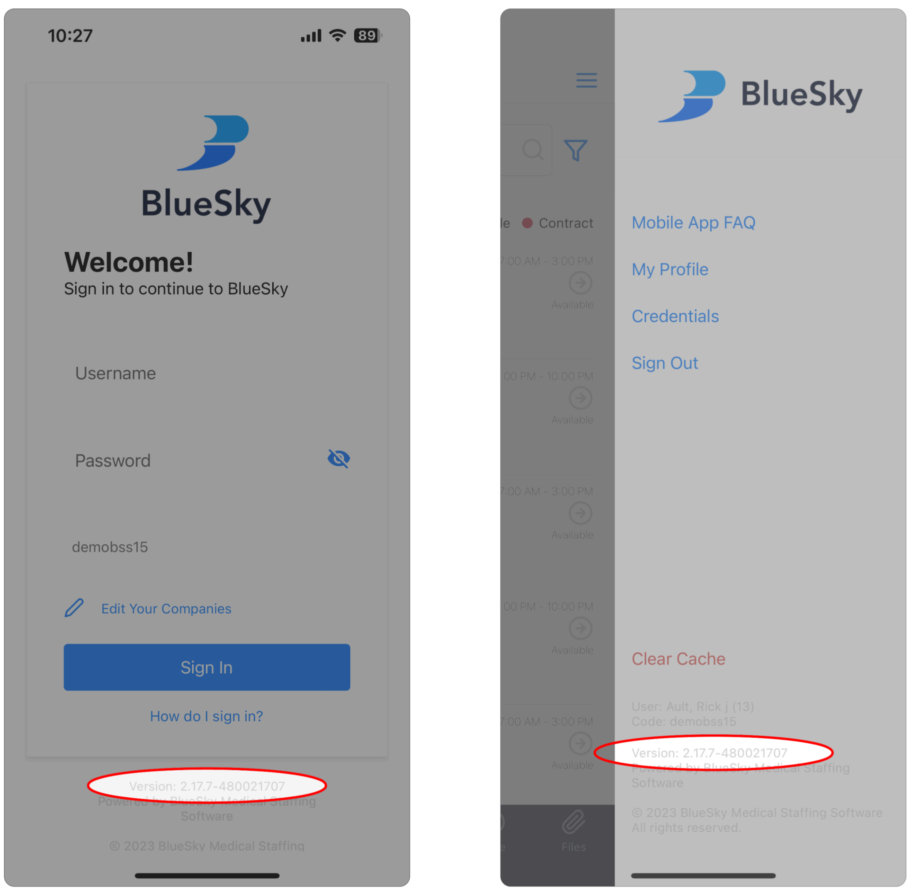


Figure 35: Locating the App's Version Number.

3. **Reinstall the App:**
    1. Remove the app from your device.
    2. Re-download the latest version from the app store.
4. **Confirm Device Compatibility:**
    1. BlueSky Mobile requires Android 11 or newer for Android devices.
    2. For Apple devices, BlueSky Mobile requires iOS 13 or newer.

Assigned Jobs are not Visible

Overview

When a shift has a duration of more than one day, each day is consolidated into a single timesheet entry. This aggregation can result in errors when loading the caregiver's schedule within the app. To prevent scheduling issues, it is important to split any assigned shift that exceeds a single day's duration.

Troubleshooting Steps

1. Navigate to the Shifts Grid:
2. Identify Multi-Day Shifts:
    1. Sort the shifts by duration by clicking the "Duration" column.
    2. Verify there are no shifts assigned with a duration exceeding one day.

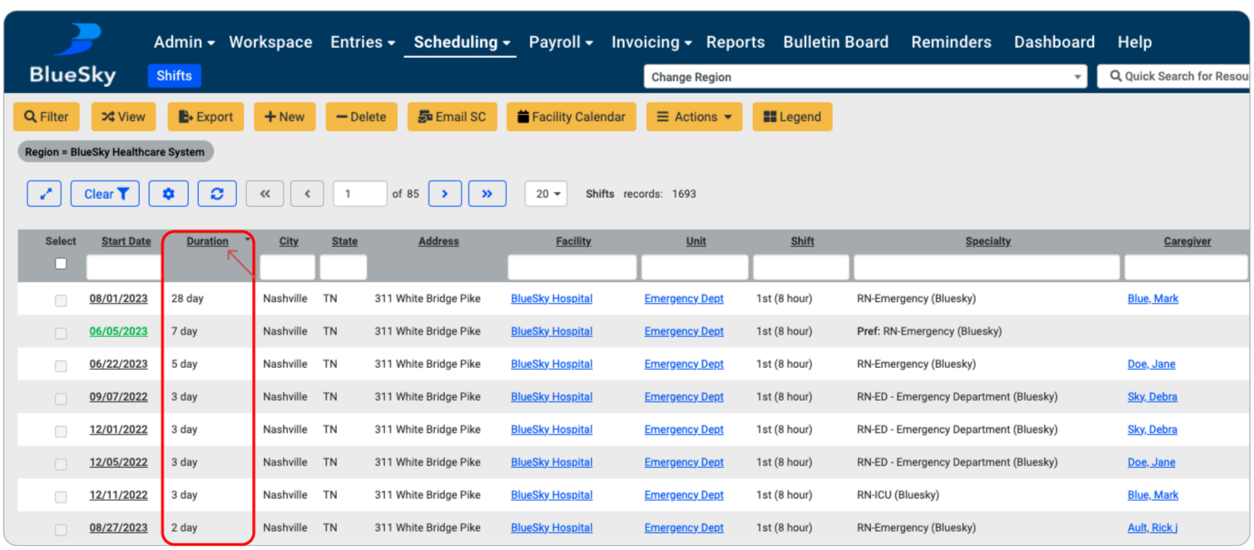


Figure 36: Locating Multi-Day Shifts.

3. Adjust Long-Duration Shifts:
    1. For shifts longer than one day, access the shift details by clicking on the shift.
    2. Select the "Create as Separate Shifts" option to divide the shift into single days.
    3. Confirm the changes by clicking "Save."

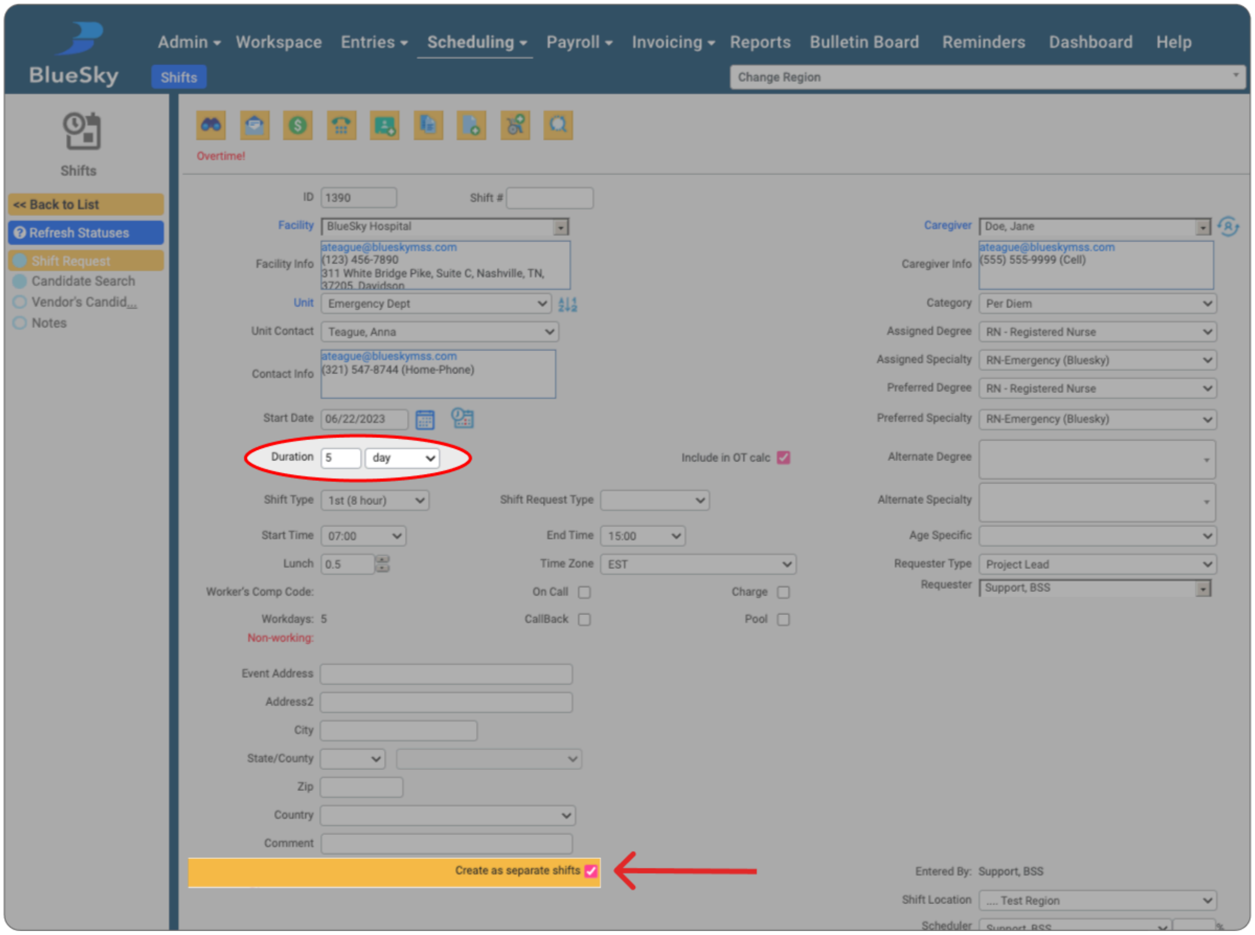


Figure 37: How to Split a Multi-Day Shift.

4. Sign out and then sign back into the mobile app.
5. The scheduled jobs should now be visible within the app as expected.

Unable to Login

Overview

When caregivers face login challenges, error messages will indicate if the issue is related to (1) incorrect login credentials or (2) an invalid company code. Should the error not be specified, it's likely due to either (3) excessive incorrect login attempts resulting in a temporary lockout, or (4) correct login permissions not being enabled. Understanding these errors is important for troubleshooting and ensuring successful access to the app.

Troubleshooting Steps: Incorrect Login Credentials

1. **Admin Reset for Caregiver Credentials:**
    1. In the BlueSky web portal, locate and select the caregiver's profile.

2. Click the “User ID / Password” button found on the “General” tab within the caregiver's profile.
3. Enter a new username and/or password as required.
4. Press OK to confirm the changes, then select 'Save' at the top right to apply the new credentials.

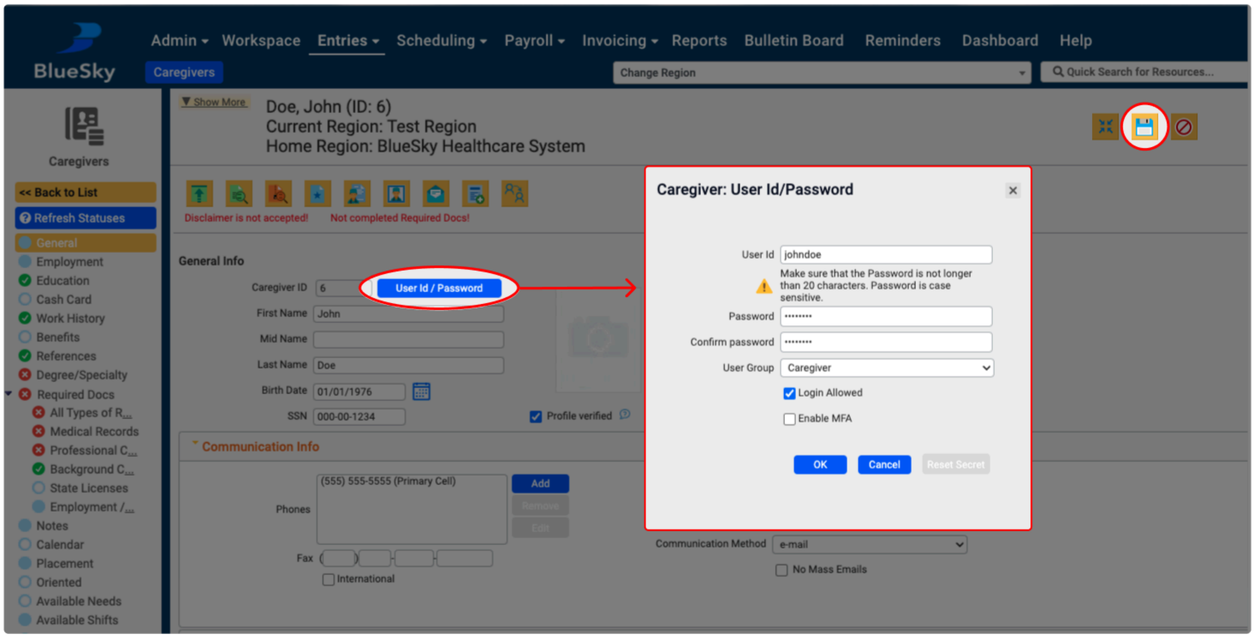


Figure 38: How to Reset Caregiver Username and Password.

2. **Self-Service Password Reset for Caregivers:** Caregivers can reset their own passwords from the BlueSky Mobile login page. Please refer to the “Reset Password Tool” section of this manual for step-by-step instructions.

Troubleshooting Steps: Incorrect Company Code

1. Confirm the caregiver is entering your company code exactly as it appears in your BlueSky URL.
    1. The code is the portion of the URL that comes before the .blueskymss.com.
    2. When inputting the company code in the mobile app, remember that the “Name” field is for the company's common name or nickname, while the “Code” field must match the exact code from your BlueSky URL.
2. To add or delete a code, the caregiver can tap the "Edit Your Companies" link on the login page.
    1. Codes can be deleted by tapping the red trashcan next to a code. Codes can be added by tapping the blue + in the top right corner.

Troubleshooting Steps: Login Not Allowed

1. If a caregiver’s credentials and company code have been verified to be correct, the profile may not have the “login allowed” checkbox selected.
2. Navigate to the caregiver’s profile in the web portal.
3. On the “General” tab, click the “User ID / Password” button.
4. Ensure the “Login Allowed” checkbox is selected.
5. Click OK to close the window.
6. Click Save in the top right corner to update the login setting.

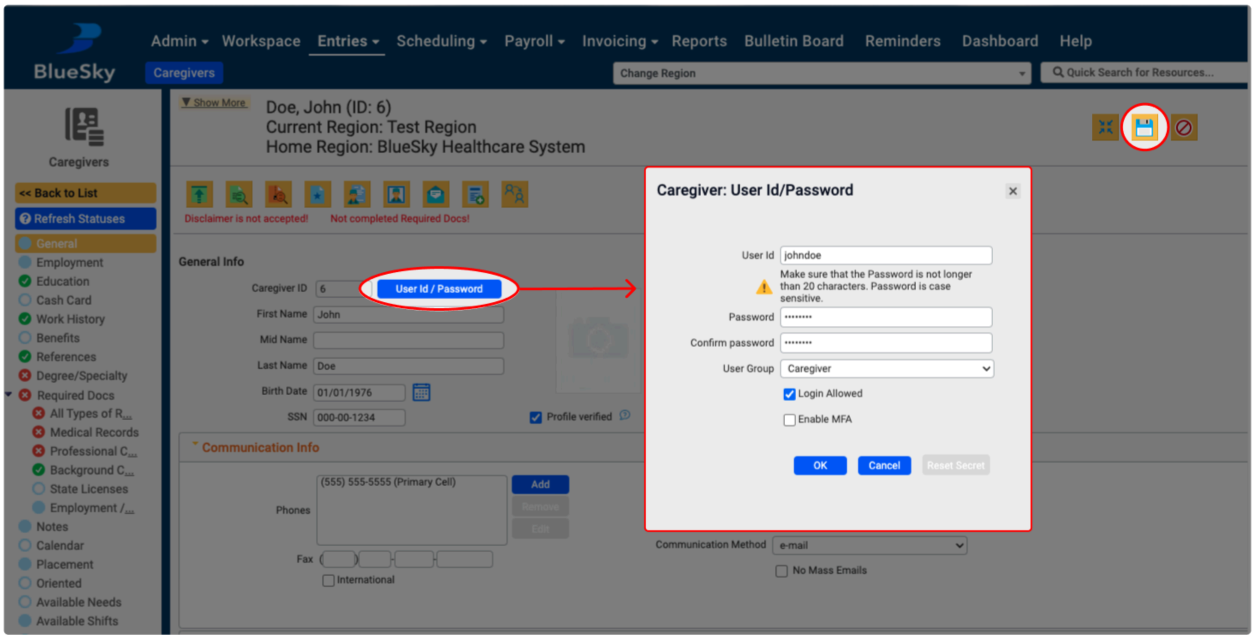


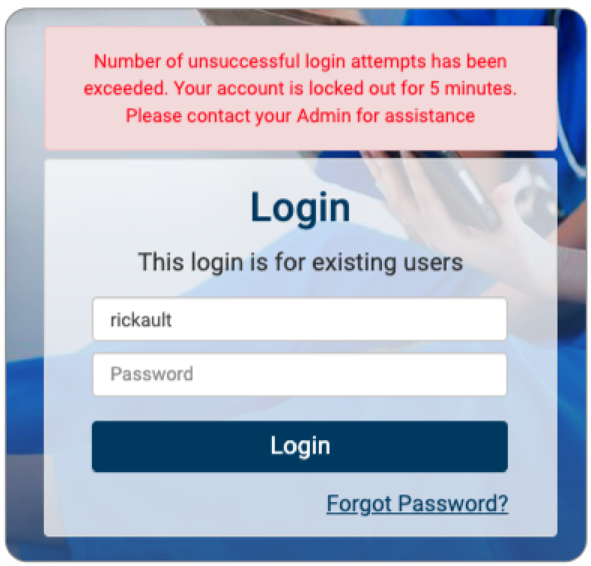
Figure 41: Login Allowed Checkbox.

Troubleshooting Steps: Too Many Login Attempts

1. In cases where a caregiver's login credentials and company code have been verified but access is still denied, it may be due to exceeding the maximum number of login attempts.
   - Three unsuccessful login attempts will trigger a temporary lockout of five minutes.

2. An account lockout can be verified by an admin by attempting to log in with the caregiver's credentials in the web portal.
   - If the account is locked, a clear error message will be displayed stating, “The number of unsuccessful login attempts has been exceeded. Your account is locked out for 5 minutes. Please contact your Admin for assistance.”

3. Admins should advise caregivers to wait for the lockout period to expire before trying to log in again or to seek password reset assistance if the issue persists.



Example of the account lockout message in the web portal.