

# HOW TO REDUCE MANUAL CHECK- INS & CHECK-OUTS

EVERYTHING YOU NEED TO KNOW TO REDUCE  
MANUAL CHECK-INS AT YOUR AGENCY.



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## Chapter 1

# Understanding the Problem

**Manual Check-in: When caregivers have an admin check them in instead of checking in themselves!**

### ► Why is this Important?

Manual check-ins often become the default because caregivers forget to check in or struggle with the app. But manual entries lead to:

- EVV non-compliance
- Higher audit risk (citations, recoupments, agency penalties)
- Incorrect payroll/billing data
- Higher administrative workload
- Client dissatisfaction when agencies ask clients to confirm times repeatedly

### ► What Causes Manual Check-ins

Common root causes include:

- Caregivers are not receiving reminders
- Poor scheduling alignment with caregiver availability
- Lack of understanding about EVV laws
- Technical barriers (low signal, unfamiliarity with apps)
- Staff forgetting to check in
- Supervisors stepping in too often “to keep things moving”

Understanding these causes allows you to fix them before they turn into audit triggers.



## Chapter 2

# How to Support Self-Check-Ins

### ■ Enable Automatic Reminders (Text, App, or Call)

Your software, if using GEOH, should send reminders when:

- A shift is about to start (10–30 minutes prior)
- A shift has started, but no check-in occurred
- A shift is ending soon (optional but recommended)

### ■ Best Practices

- Use multiple reminders (pre-shift, at shift start, 5 minutes after shift start).
- Make reminders short, clear, and consistent.
- Include the check-in link when possible.

### ■ Reminder Templates

#### **Pre-shift:**

“Hi {Name}, your shift with {Client} starts soon. Please open GEOH and check in when you arrive.”

#### **After missed check-in:**

“Your shift has started, but there is no check-in yet. Please check in immediately.”



## Chapter 3

# Train Your Caregivers

### ■ What they **MUST** know

During onboarding, teach caregivers:

- How to check in/out on the app
- Why EVV is required by law
- What happens if they fail to check in
- What to do when they have device issues
- How to contact support

Provide hands-on practice during onboarding.

### ■ Explain the **Why**

Caregivers comply far more when they understand:

- EVV protocols are state-required
- Missing check-ins can cause state investigations
- Repeated violations may lead to disciplinary action

You don't need to scare them, but clarity improves compliance.

### ■ Recommended Training Materials

- GEOH has caregiver training weekly to help caregivers use the software
- Step-by-step PDF or video
- Scripted practice scenario
- Quick troubleshooting card
- A “What To Do If...” reference sheet



## Chapter 4

# Schedule with Your Caregivers

### ■ Include Caregiver Preferences

Caregivers who receive schedules aligned to their availability are:

- On time more often
- Less likely to miss shifts
- Less likely to forget check-ins

Before assigning a shift, ask:

- Preferred days
- Preferred hours
- Transportation limitations
- Preferred distance radius
- Client-type preferences

### ■ Build Schedule 2 Weeks in Advance

This:

- Reduces scrambling
- Reduces caregiver burnout
- Improves planning
- Allows caregivers to prepare mentally

### ■ Communicate Schedule Clearly

Every caregiver should receive:

- A copy of the schedule
- A reminder 24–48 hours before a new week begins
- Alerts about changes



## Chapter 5

# Create a Strike System

### ■ Step One

*Notify caregivers via email that organic check-ins are required*

### ■ Step Two

*Properly train caregivers on how to check-in*

### ■ Step Three

*Create a strike system:*

- *Strike one: verbal warning*
- *Strike two: written warning*
- *Strike three: Consequence or Suspension*







## Chapter 6

# Operations Process

### ► Guidelines to go by:

CMS guidelines typically recommend a rate below 15% for this. But this varies from state to state.

**Because manual check-ins trigger audits, GEOH's standard is less than 10%.**

### ► Daily Monitoring Checklist

- ☐ Missed check-ins
- ☐ Manual check-ins
- ☐ Duplicate or overlapping shifts
- ☐ Incomplete visit data
- ☐ Caregivers with patterns (late, chronic manual entries)

### ► Weekly Reviews

Look for:

- Caregivers with high manual entry rates
- Clients who frequently report discrepancies
- Schedules that result in repeated lateness
- Caregivers approaching disciplinary thresholds

### ► Monthly Reviews

Evaluate:

- Trending problems
- System issues (device failures, reminders not sent)
- Training needs
- Staffing issues





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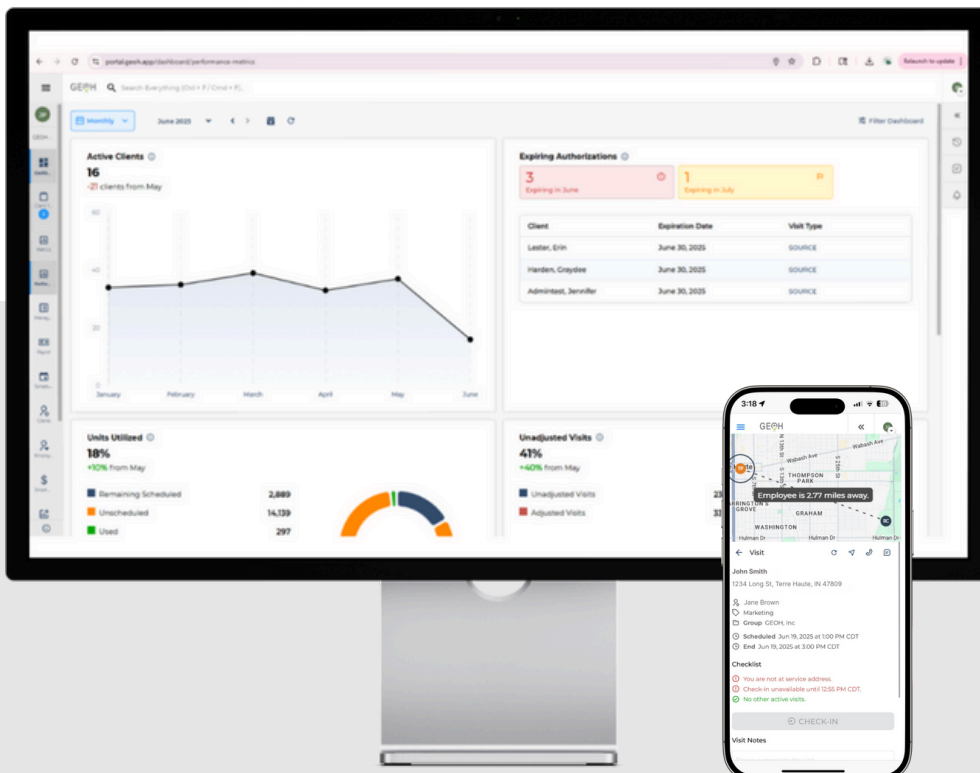
# THANKS FOR READING!

**We hope you found this guide helpful!**

**If you ever require assistance, remember GEOH is here to help!**

**We believe that great things are in store for your agency!**

**Call 317-455-3218 or [book a meeting here!](#)**



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