# HealthcareSource
# Contingent Talent Management

BUSINESS UPDATE

HealthcareSource®
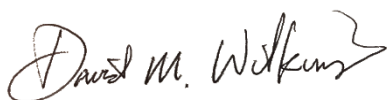Quality Talent. Quality Care.

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# Executive Message

As our second largest business line, Contingent Talent Management℠ is a significant contributor to the growth and profitability of HealthcareSource®. Recently, we've made several organizational and business decisions to accelerate that growth and would like to share some of those investments.

In late 2019, Manny Gagliardi was promoted to Managing Director for Contingent Talent Management. Manny has a storied history with Contingent Talent Management and a depth of industry expertise that is unmatched. He has also run all facets of this business, from running Contingent Talent Management as a staffing agency client to running engineering and product development for the product itself when he was hired by Clearview, the original owner of the solution. With Manny's promotion, we also made substantial business investments, including hiring additional headcount, establishing an offshore development team, and leveling up the leaders of the services, product, and engineering teams. Each of these leads has over a decade of staffing agency experience as well as experience with the Contingent Talent Management solution specifically.

Already, clients are directly feeling the results of these investments in multiple ways, ranging from higher-quality service engagements to satisfaction with product innovation and the speed of releases. Year over year, client satisfaction with services engagement is up 26%, call resolution time has improved by 31%, and our client churn rate is less than 4%, which is almost two times better than the industry average. Our uptime is averaging 99.9%, which matches rates for top-performing SaaS offerings. In the first half of 2020, we've already exceeded the total product release output of the full year for 2019, including some highly innovative features that will dramatically speed up order fulfillment through self-service capabilities, automated matching, and a redesigned mobile user interface. Perhaps most importantly, we have significantly reduced latency issues while improving overall system responsiveness.

We hope you've experienced some or all of these improvements first-hand. Read on for a more detailed review of key product investments over the past six months and a look forward to the rest of 2020. We welcome your feedback on the work we've completed to date, and we'd love to hear more about how we can better serve your challenges going forward.

Thank you for your business.

**David Wilkins**
Chief Strategy Officer

**Manny Gagliardi**
Managing Director

![HealthcareSource® Quality Talent. Quality Care.]

# Year-to-Date Progress

Our 2020 reorganization and investment in doubling our engineering staff have resulted in real progress toward our innovation and maintenance development goals. Below are the highlights of our accomplishments year-to-date. Every feature reported in this Business Update is currently released and available. If you're interested in incorporating these features into your instance of Contingent Talent Management (herein CTM), please contact our support department.
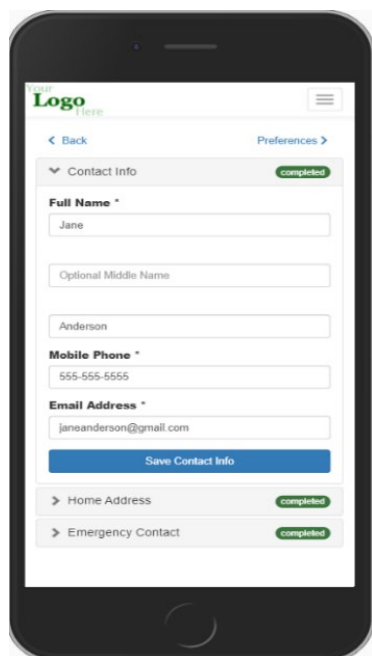
## Mobile Workforce Portal

Workforce Portal is CTM's new mobile-enabled replacement for its classic Temp Access and RSS Candidate experience. The currently released version has the following features, separated into two distinct experiences: an applicant experience and a worker experience.
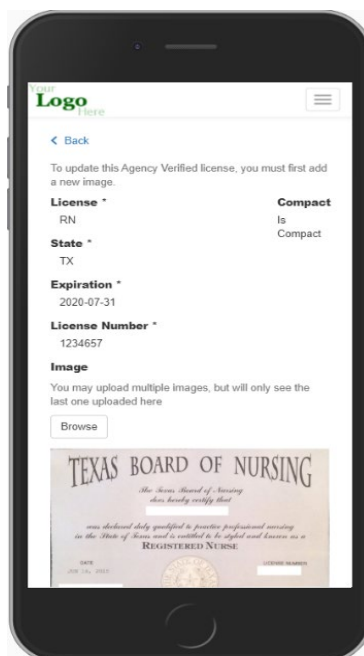
### Applicant Experience

The applicant experience focuses on getting healthcare professionals through the application process quickly and completely. Application packets are built based upon auto-assign configuration in our requirements engine. Applicants can fill out an application, upload credentials, and complete a skills checklist via any mobile-enabled device. Mobile testing and electronic document capabilities are currently in development, with a release planned for the second half of the year (see Remaining Year Plan).

| Mobile Application | Mobile Credentials | Mobile Skills Checklists |
|---|---|---|

## Worker Experience

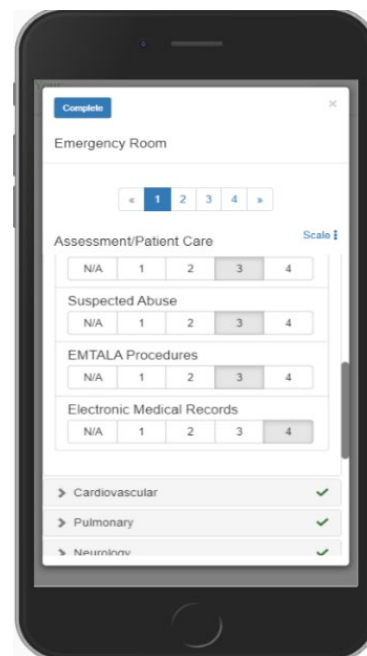Once you hire an applicant, the Workforce Portal will automatically shift from the applicant experience to the worker experience for that individual. Through the worker experience, your actively working healthcare professionals can:

- Update profiles and credentials
- Update existing, or complete additional, skills checklists
- Receive and respond to shift-matching alerts via text
- Request and self-schedule shifts
- View current schedules and update availability, as needed
- Submit timecards
- Download pay stubs
- Set user event notification subscriptions (see below)

## User Event Notification Subscriptions

*"Can I get an email notification when that happens?"*

Our answer is now a resounding, "Yes!" Members of your workforce can now subscribe to various events that occur within CTM. So far, we've developed a collection of email notifications for changes relating to healthcare professionals and orders, such as:

## Healthcare Professional Events
- Status changed
- Profile created or updated

## Order Events
- Order created, updated, filled, or re-opened
- Temp request declined or removed
- Temp confirmed or unconfirmed
- Client confirmed or unconfirmed

Now that the necessary database architecture and services are in place, you will see many more event notifications in future releases. If you have suggestions for additional event notifications, please email Product@ContingentTalentMangement.com.
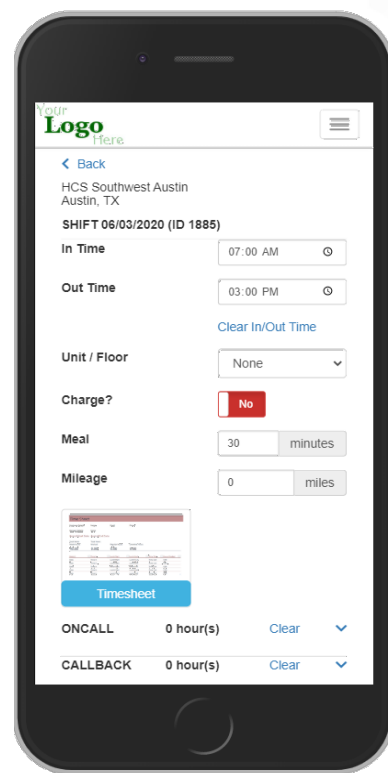
## 2020 W4 and Withholdings

When the 2020 W4 Form changed, it required significant modification in the way withholdings were tracked and calculated in CTM.

## Major Performance Improvements

### Order Query Tuning

The order query is one of the most commonly used functions in CTM. It's the primary proactive workflow for booking shifts. We redesigned and streamlined this query in the first quarter, and it's now running much more reliably and efficiently. Upcoming changes to compliance validation will continue to improve this feature.

Additionally, through the release of shift text alerts in Workforce Portal, workflow improvements to the shift request process, and improvements to self-scheduling, we're decreasing the dependence on this manual process in favor of more automation and self-service features.

### Clustered Database Architecture

One of the most significant contributions we made to CTM's overall stability and performance is a new architecture that allows HealthcareSource to host our extensive client-base on multiple database clusters.

An added benefit of this new architecture is our ability to now offer direct SQL access to your CTM database through the Azure Cloud (see below).

## Azure Cloud Database Access

This new feature allows you to gain direct SQL access to your CTM database. Commonly referred to as a "replicated database," this solution will enable you to build additional reporting and business workflows based on your CTM data if desired. With direct access to your CTM database, you can use a self-service analytics tool, like Microsoft Power BI, as well as other reporting tools and custom applications to gain access to and develop insights from your operational and financial data.

## Client Satisfaction

As part of our reorganization, we hired an experienced healthcare staffing expert to lead our support and services department. Corrine Driggers brings a level of empathy one can only attain by working in an agency directly as well as a passion for customer service excellence.

Working collaboratively with our larger engineering team and their new leadership, we have taken our defect days outstanding from 45 to just under 20 days. Year-to-date, we have fixed and released over 125 reported issues and closed more than 2,574 service requests. As a team, we have made great strides, but we are not finished. We are planning to improve on our accomplishments even more and are actively developing tools to handle routinely reported issues more quickly and without the need to involve support. Please watch your monthly release notes for the announcement of these new tools.

# Nursys E-Notify Integration

The Nursys E-Notify service is the registration of your RN Healthcare Professionals' licensures for monitoring and reporting of actions in all 50 states. CTM has simplified the process of enrolling licenses with this new integration module. If you're interested in utilizing this feature, please contact our support team at CTMSupport@healthcaresource.com to arrange a conversation with our implementation team.

# ClearConnect APIs

ClearConnect is CTM's API platform. It allows external developers to read, write, and update data directly in CTM. Companies like JobRobotics use these services to insert and update shift and travel orders in CTM from VMS and MSP providers. With ClearConnect, we can integrate CTM with TextUs, HubSpot, and Track5Media.

Year-to-date, we have released or updated the following API Methods:

- setFederalTaxParameters: Sets 2020-W4 Federal Tax Parameters
- getCompliance: method to validate an HCP's ability to fill a specific order by evaluating and returning credential, orientation, Double Book, Double Shift, and Overtime state
- createTempRequestForShift: method to suggest an HCP to fill a specific shift. This method will also evaluate and return credential, orientation, Double Book, Double Shift, and OT state
- getTempConfirmationForShift: Retrieves the Temp's confirmation information for a specific order
- updateTempConfirmationForShfit: method to confirm an HCP for a specific shift
- updateClientConfirmationForShfit: method to confirm a Client for a specific shift
- updateOrders: can now cancel and re-open a filled shift

# CTM Event Webhooks

Webhooks are utilized in integrations to report certain events that occur in CTM to another system so that system can act. For example, a healthcare staffing job board needs to know when a new order is inserted into CTM so it can be published online. That job board would provide us the location in which they want our notification sent when such an event occurs.

Year-to-date, we have developed and released the following event webhooks; many more are coming. If you have suggestions for additional event webhooks, please email Product@ContingentTalentMangement.com.

## Shift Events

- Shift Created: When a new per diem order is created
- Shift Confirmed by Client: When a client confirms a per diem order
- Shift Confirmed by Temp: When a temp confirms a per diem order
- Shift Filled: When a per diem order is filled
- Temp Confirmation Remove from Shift: When a per diem order is Temp Unconfirmed
- Client Confirmation Removed from Shift: When a per diem order is Client Unconfirmed
- Temp Request for Shift: When a temp is suggested to fill a per diem order

- Temp Request Declined: When a suggested temp is rejected from filling a per diem order
- Temp Request Removed: When a suggested temp is removed from a per diem order

## Temp Profile Events
- Temp Profile Created: When a temp profile is created
- Temp Profile Updated: When a temp profile is updated
- Temp Status Change: When a temp's status is updated

## Client Profile Events
- Client Profile Created: When a client profile is created
- Client Profile Updated: When a client profile is updated
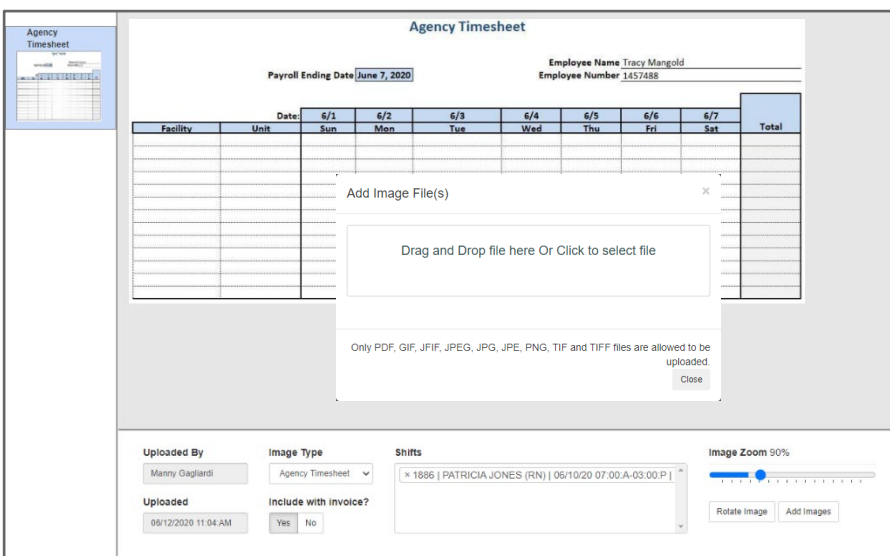
# Booking Region

Our new booking region feature supports the utilization of a single client record by agencies with multiple service lines and operating units. The primary issue before this release was the inability to separate booked orders at the same facility, under the same contract. The booking region feature resolves this issue by allowing the user to assign a booking region upon order fill. This value can then be used in reports and integrations to determine operational and financial credit for the booking. To take advantage of the booking region feature, please contact our support team at CTMSupport@healthcaresource.com and an implementation specialist will schedule a time to review this feature with you and your team.

# Shift Splits Module

Before this release, CTM split shifts statically, at 3:00 p.m. and 11:00 p.m. Our new shift splits module enables users to set shift splits dynamically from within the shift configuration manager.

# Timecard Image Manager

We made a significant enhancement and technology upgrade to our image association to timecard funtionality. The new, more responsive Timecard Image Manager features drag-and-drop functionality, enabling a more efficient user experience. Additionally, Timecard Image Manager is now native to (inside) CTM, so users no longer need to hassle with installing a separate Windows application.

## Time/Data Import Enhancements

We released time/date import functionality in the fourth quarter of 2019 to a group of early adopters. This capability enables time and attendance data to be imported into CTM from systems like Kronos, thereby automating the reconciliation of timecards against undisputable client facility data. For example, if a temp gets paid based upon a different date, the import will automatically create pay corrections that you can either approve or decline.

Based on early adopter feedback, we made several enhancements to improve versatility across various time capturing solutions. If you would like a demo of this feature, please send a request to Product@ContingentTalentManagement.com.

## Gross Margin Report

CTM now offers a gross margin report: a comprehensive export of all payroll and billing data across your per diem and long-term business lines. As such, this report gives you a single source of financial data across your entire business.

## SOC for Service Organizations

Because HealthcareSource provides services to other organizations, it is imperative we ensure the financial and security controls we have in place are designed and operate effectively. That's why we undergo System and Organization Controls (SOC) audits each year on our organization and its products and services, including CTM. By undergoing the rigorous SOC audits, we provide clients certified proof of the integrity of our processes.

# Remaining Year Plan

## Mobile Competency Testing

The CTM Development Team has rearchitected CTM's competency testing solution and is now developing the services and user interface that will deliver tests in a mobile format. This format will eliminate our current dependency on Flash. All major browsers have announced they will no longer support Flash beginning in early 2021. As such, we plan to release mobile testing in the third quarter of 2020.

## Mobile Electronic Documents and Signatures

Once the development of this capability is complete, healthcare professionals will be able to review and sign electronic documents on any desktop, tablet, or mobile device. We plan to release this feature early in the fourth quarter of 2020.

## Credentialing (RSS) Conversion

When the CTM Development Team completes their work on mobile electronic documents and signatures, existing Candidate experiences currently provided by RSS will be redirected to use our mobile solution.

## Workforce Portal Calendar View

Upon completion of this capability, your active healthcare professionals will have a unified, calendar-based view that allows access to:

- Shift requests and Self-scheduling
- Current work schedule
- Facility directions
- Availability maintenance
- Timecard submission

## Hubspot Integration

HubSpot, Inc. is the world's leading inbound marketing and sales platform. CTM is enhancing its existing integration with HubSpot to provide bi-directional sharing of healthcare professionals' profile data. The integration requires an account with HubSpot and an implementation consultation with HealthcareSource.
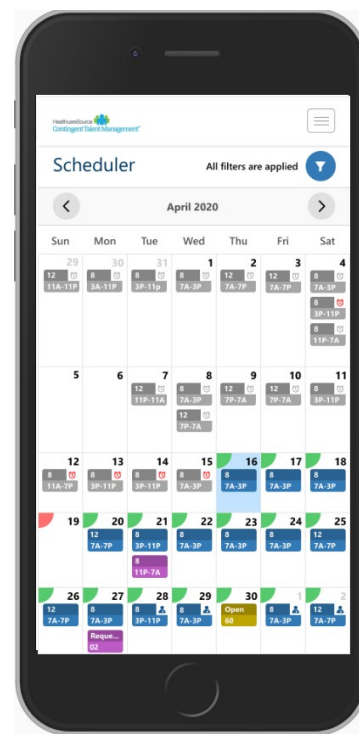
## Workforce Portal Self-Scheduling Enhancements

The CTM Development Team is working closely with early adopters of the Workforce Portal's self-scheduling feature to design more intuitive workflows that will create efficiencies and enable you to increase bookings. We are currently planning to deliver the following enhancements early in the third quarter of 2020:

- Automate the delivery of client confirmations
- Extend staffing event notifications to client contacts
- Configurable controls over self-scheduling workflows
- Enhanced visibility into text alerts being sent

## Workforce Portal Time Collection

The Workforce Portal's time collection capability will get an overhaul to simplify the user experience for your active healthcare professionals. This enhancement will also enable payroll and invoicing to be processed more quickly and at less cost. We are currently planning to deliver this enhanced functionality:

- A streamlined user workflow
- Geo-location tracking
- Punch-in and punch-out features
- Digital timecard creation and approval (no more paper timecards)
- System event alerts
- Late time punch
- Time entry completed
- Timecard submitted

## Facility Portal: Client Access Replacement

Just as Workforce Portal is CTM's new mobile-enabled replacement for its Temp Access experience, Facility Portal will be our replacement for its Client Access experience. Designed with additional functionalities, the Facility Portal now enables Client Contacts to log in to review reconciled timecards and approve time that is eventually paid and billed in CTM. All features in the legacy Client Access experience will be transitioned to Facility Portal in 2021.