

# In-Service Compliance Window

## Quick Guide

Choose the right compliance tracking method for your agency.

### At a Glance

- New setting: Choose **Calendar Year** or **2 Years**
- Default remains 2 Years (730 days)
- Aligns compliance with state requirements
- Changing this recalculates caregiver compliance immediately

### Which Option Should You Choose?

Option	Best For	What it Means
2 Years (730 days)	Agencies using rolling compliance	Tracks last 730 days continuously
Calendar Year	Agencies with annual requirements	Resets Jan 1 each year

### How it Works

#### 2 Years (Rolling Window)

- Tracks last 730 days from today
- No fixed reset date
- Compliance re-evaluated daily against the rolling window

#### Calendar Year

- Tracks Jan 1– Dec 31
- Resets every year
- Full year to complete hours

### Example: What Changes When You Switch

#### If Using Calendar Year:

- Caregiver completes hours in 2025
- Does NOT complete hours in 2026



#### Result:

- Compliant in 2025 and 2026
- Not compliant on Jan 1, 2027

#### If Using 2 Years:

- Caregiver completes hours on Mar 1, 2025
- Does NOT complete hours in 2026

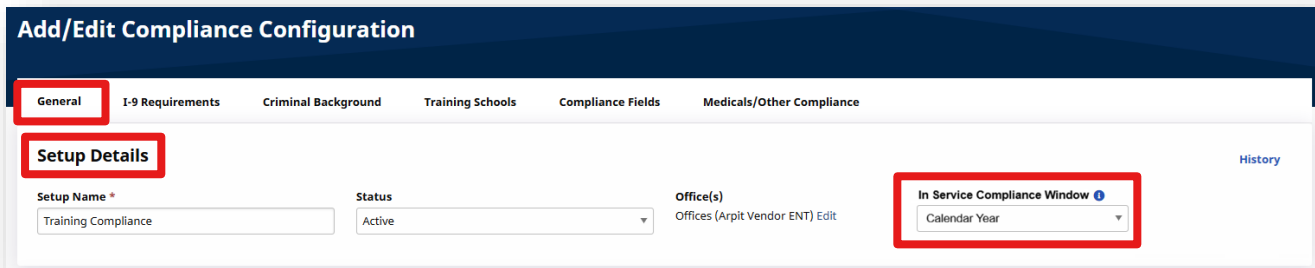


#### Result:

- Compliant in 2025 and 2026
- Not compliant on Mar 2, 2027

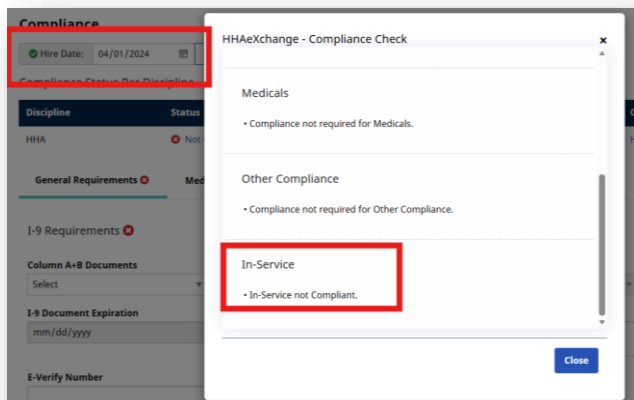
## Path:

Admin → Compliance Setup → General → Setup Details → In-Service Compliance Window

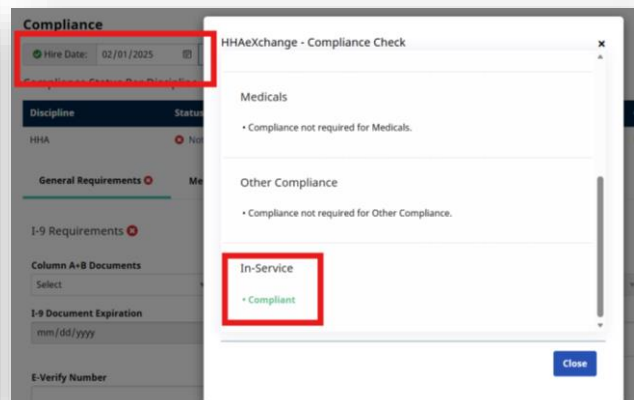


## What Happens When You Change It?

- ✓ Compliance statuses are recalculated immediately, and some caregivers may fall out of compliance
- ✓ Updates appear in **Caregiver Profile → Compliance tab**
- ✓ Impacts In-Service records and statuses



Not Compliant



Compliant



### Before Making Changes

- ✓ Confirm state or payer requirements
- ✓ Review caregiver training completion
- ✓ Align with internal teams
- ✓ Consult your Customer Success Manager if unsure



### Next Steps

1. Review compliance requirements
2. Confirm your current tracking method
3. Decide if a change is needed
4. Update the setting
5. Monitor caregiver compliance after the update