AssuriCare

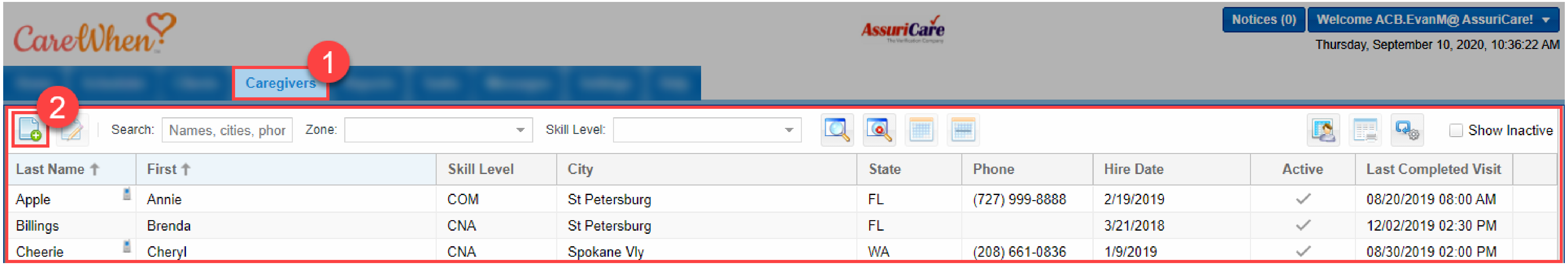
CareWhen Lite Training

Adding & Inactivating Caregivers

CareWhen Lite is a simplified version of CareWhen. Functionality and features discussed in this training may only be available by upgrading to the full version of CareWhen. Contact your DWIHN Administrator for upgrade options.

Adding a Caregiver – Getting Started

Adding a Caregiver in CareWhen can be accomplished in a few simple steps. Start by selecting the Caregivers tab. Once selected, click on the Add button.

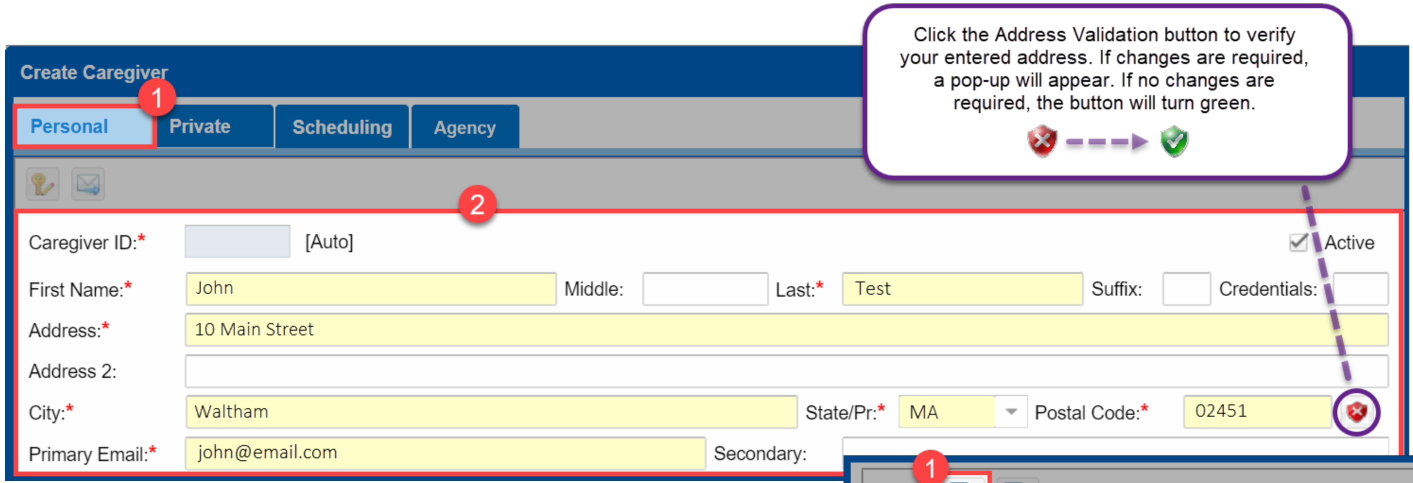


Upgrade to the full version of CareWhen to access the ability to add Prospective Caregivers; potential Caregivers for your agency that can be activated later.

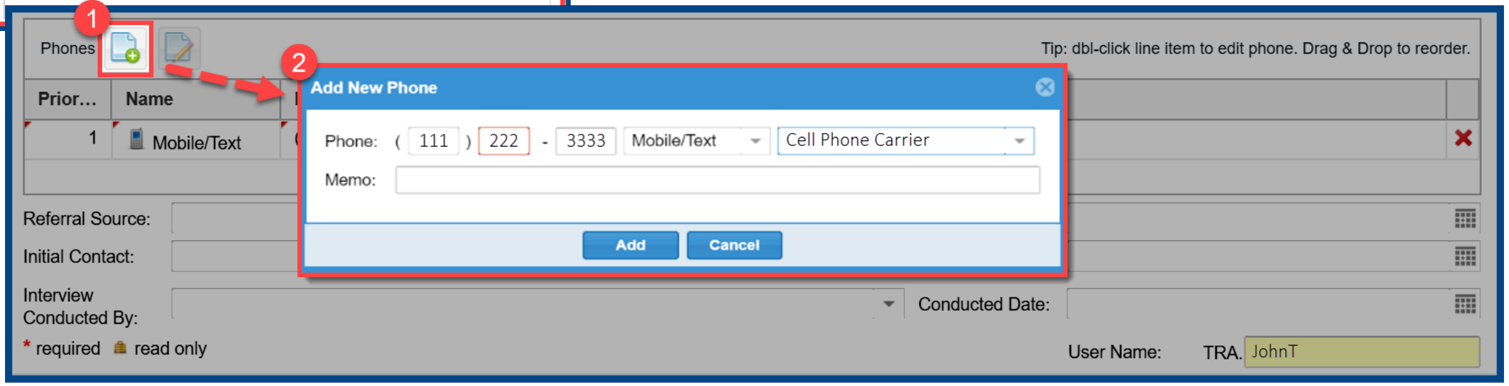
To learn how to set up the dropdown options for caregiver tab fields, see the CareWhen Configuration training

Adding a Caregiver – Personal Information

Start with the Personal tab. Here you enter general information for the Caregiver. Items that are required for this step are marked with red stars. To add phone numbers to a Caregiver, select the Plus button, input their complete phone information and click Add.



Note that to use the Find Available feature (see Creating & Managing Visits) the caregiver's cell phone carrier must be entered.



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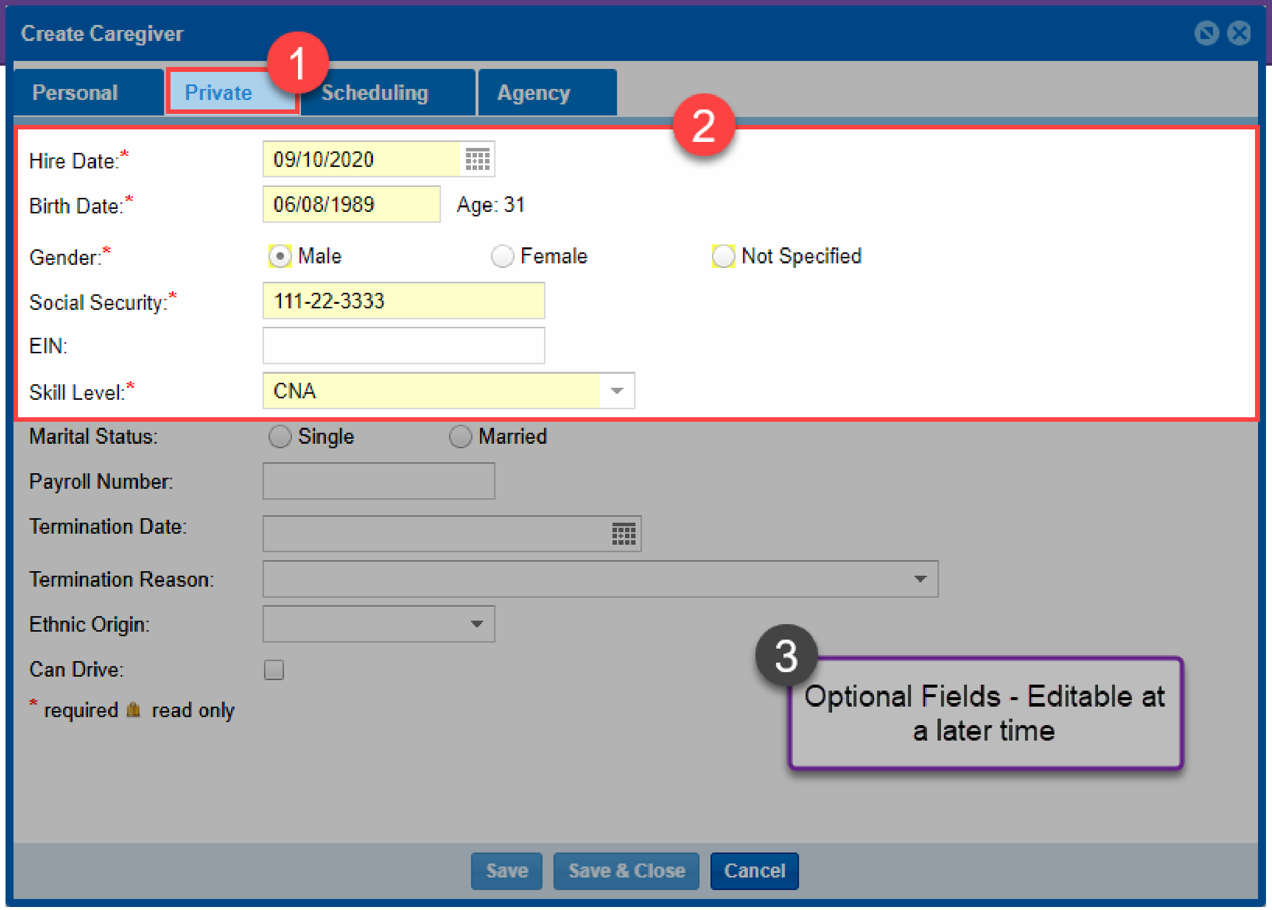
Adding a Caregiver – Private Information

The second tab is the Private tab. Here, input all required information, as well as any available optional information.

- The skill level that the caregiver is assigned will determine what type of visits they can be assigned. See the *CareWhen Foundations* training for more information on skill levels.



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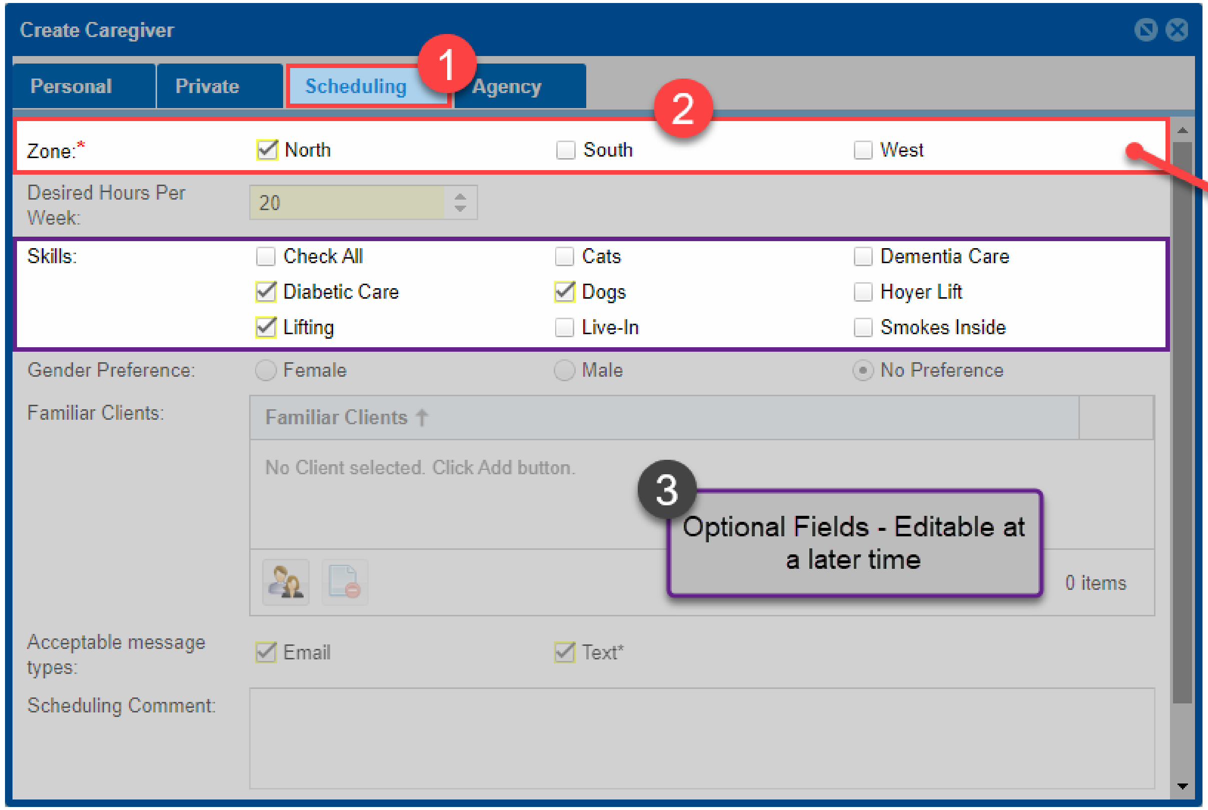
Adding a Caregiver – Scheduling Information

From the Scheduling tab, you must select the Caregiver's service Zone(s). Caregivers can be assigned to multiple zones. You may then enter in any available optional information.

- Associate the Caregiver with whichever Zones they will be servicing.
- The skills on the Scheduling tab will be used to match the caregiver up with the Client's Needs. If the caregiver does not have a particular client need, a warning will generate when assigning the visit (if enabled).



Zones are used to identify regions or office locations. Clients are associated to a single Zone, but Caregivers can be assigned to multiple Zones for which they are available to service.

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Adding a Caregiver – Agency Information

Finally, the Agency tab will be presented as the last tab to edit. Agency Role is required and should be left on the default Caregiver Limited View. Click Save and Close to complete adding the caregiver.

- Unless a Caregiver works in the agency requiring elevated CareWhen privileges, their Agency Role must be selected as Caregiver Limited View.
- The Allow Flexible Scheduling option must be checked to allow Caregivers to complete visits in the system.
- Toggle AIM Recipient on to grant the Caregiver access to Agency Internal Messaging.

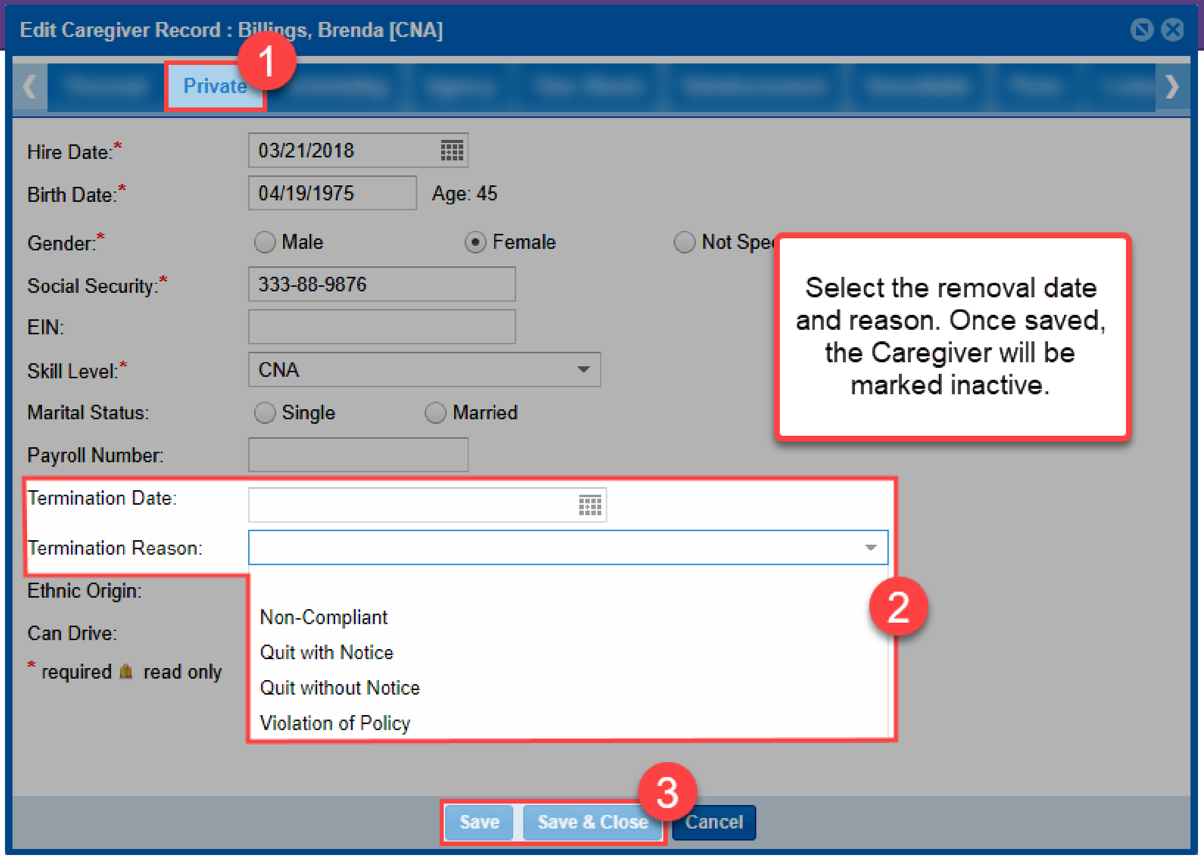
To learn how to set up the dropdown options for caregiver tab fields, see the CareWhen Configuration training

Inactivating a Caregiver

Inactivating a Caregiver in CareWhen is straightforward as well. Simply click into the caregiver and then select the removal date and reason on the Private tab.

Once inactivated:

- Any future visits that were assigned to the caregiver will show as unassigned
- The caregiver will not be able to check in or out using the mobile app
- When looking at caregiver reports, you can elect to include inactive caregivers or exclude them



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