



## 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.

The screenshot shows the CareWhen interface. At the top, there's a header with the CareWhen logo, AssuriCare logo, and user information: "Notices (0)", "Welcome ACB.EvanM@ AssuriCare!", and the date "Thursday, September 10, 2020, 10:36:22 AM". Below the header, there's a navigation bar with a "Caregivers" tab highlighted. A red box labeled "1" is around the "Caregivers" tab. Below the navigation bar, there's a search bar with "Search: Names, cities, phor" and "Zone:" and "Skill Level:" dropdowns. A red box labeled "2" is around the "Add" button (a plus icon in a square). Below the search bar, there's a table of caregivers.

Last Name ↑	First ↑	Skill Level	City	State	Phone	Hire Date	Active	Last Completed Visit
Apple	Annie	COM	St Petersburg	FL	(727) 999-8888	2/19/2019	✓	08/20/2019 08:00 AM
Billings	Brenda	CNA	St Petersburg	FL		3/21/2018	✓	12/02/2019 02:30 PM
Cheerie	Cheryl	CNA	Spokane Vly	WA	(208) 661-0836	1/9/2019	✓	08/30/2019 02:00 PM



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

AssuriCare Proprietary and Confidential

# 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.

Click the Address Validation button to verify your entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.

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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.

**Create Caregiver**

Personal **Private** Scheduling Agency

Hire Date:\* 09/10/2020

Birth Date:\* 06/08/1989 Age: 31

Gender:\* ☒ Male ☐ Female ☐ Not Specified

Social Security:\* 111-22-3333

EIN:

Skill Level:\* CNA

Marital Status: ☐ Single ☐ Married

Payroll Number:

Termination Date:

Termination Reason:

Ethnic Origin:

Can Drive: ☐

\* required 📄 read only

Optional Fields - Editable at a later time

Save Save & Close Cancel

# 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.

# 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.

The screenshot shows the 'Create Caregiver' form with the following fields and annotations:

- 1**: Points to the 'Agency' tab.
- 2**: Points to the 'Agency Role' dropdown menu, which is set to 'Caregiver Limited View'.
- 3**: Points to the 'AIM Recipient' checkbox, which is checked. A callout box states: 'To enable AIM messaging, a Caregiver must have an email address entered and at least one messaging contact type enabled.'
- 4**: Points to the 'Save & Close' button.

Other fields visible include: 'Limit By Zone' (checkbox), 'Disable AIM Messaging Notification' (checkbox), 'Notify Release Notes' (checkbox), 'Signature Capture' (checkbox), 'Receive Emailed Documentation' (checkbox), 'Documentation Email' (text field), 'Allow Time Sheet Approval' (checkbox), and 'Home Office' (dropdown menu). The 'Allow Flexible Scheduling' checkbox is also checked.

# 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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Select the removal date and reason. Once saved, the Caregiver will be marked inactive.

Termination Date:

Termination Reason:

Non-Compliant  
Quit with Notice  
Quit without Notice  
Violation of Policy

Save Save & Close Cancel