



CareWhen Lite

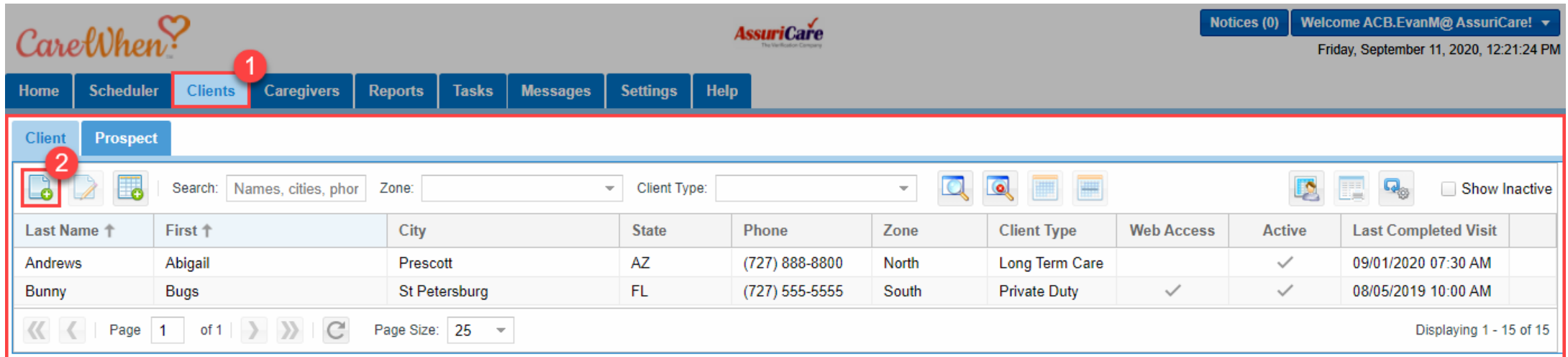
Adding & Inactivating Clients



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 Client – Getting Started

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



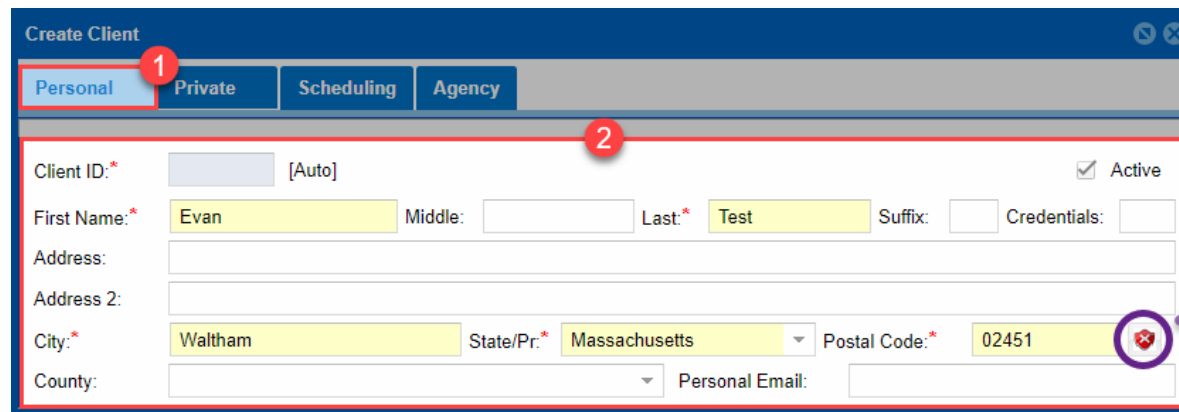
The screenshot shows the CareWhen web application interface. At the top, there's a navigation bar with tabs: Home, Scheduler, Clients (highlighted with a red box and a red circle with the number 1), Caregivers, Reports, Tasks, Messages, Settings, and Help. Below the navigation bar, there's a sub-header with 'Client' and 'Prospect' tabs. Under the 'Client' tab, there's a red box around a plus icon with a red circle and the number 2. To the right of the plus icon are search and filter options: 'Search: Names, cities, phor', 'Zone: [dropdown]', 'Client Type: [dropdown]', and a 'Show Inactive' checkbox. Below these are two data rows for clients: Andrews, Abigail, Prescott, AZ, (727) 888-8800, North, Long Term Care, and Bunny, Bugs, St Petersburg, FL, (727) 555-5555, South, Private Duty. At the bottom, there's a pagination bar showing 'Page 1 of 1', 'Page Size: 25', and 'Displaying 1 - 15 of 15'.



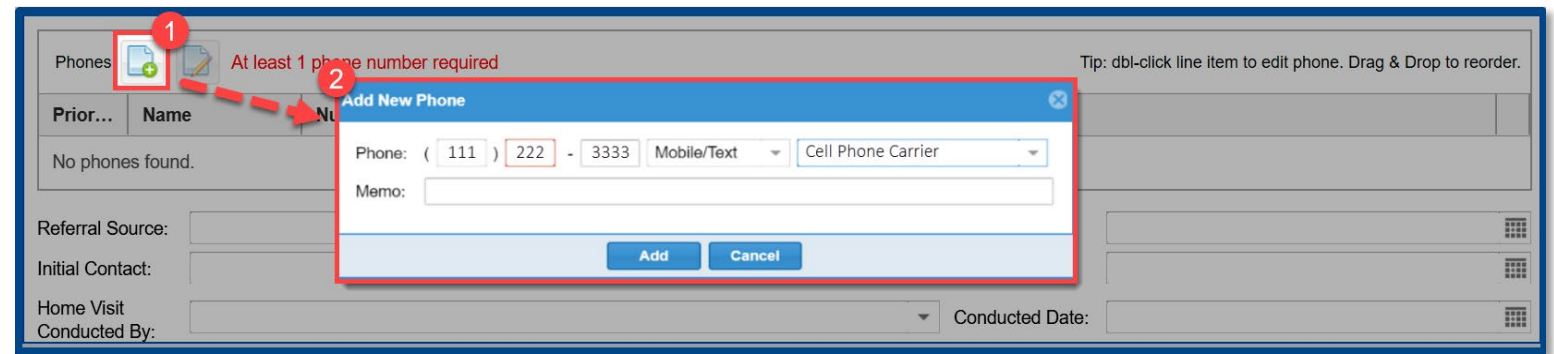
Adding new Clients in CareWhen is restricted to the full version. Upgrade to access the ability to add new clients and prospective clients to your agency.

Adding a Client – Personal Information

The first of four input tabs is the Personal tab. Here you enter general information for the Client. Items that are required for this step are marked with red stars. To add phone numbers to a Client, select the Plus button, input their complete phone information and click Add. Multiple numbers can be dragged into priority order.

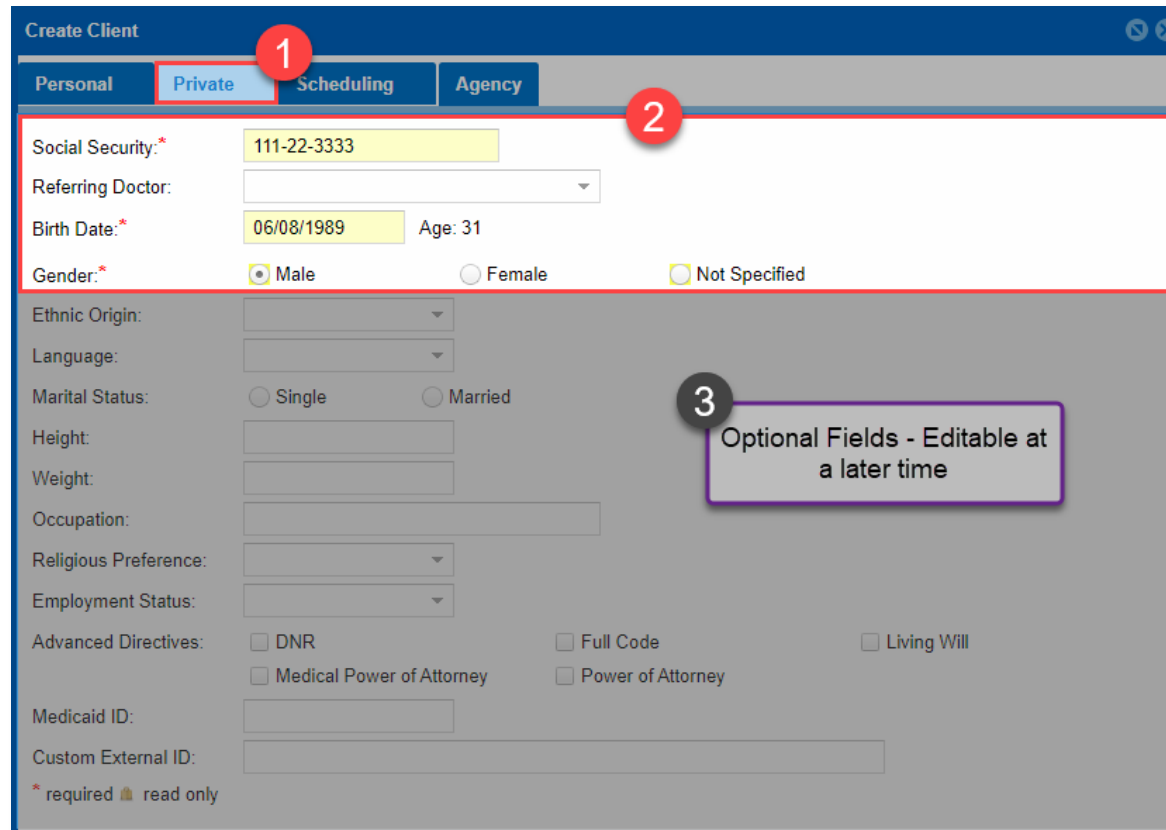


Click the Address Validation button to verify your entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.



Adding a Client – Private Information

The second tab is the Private tab. Here, input the Client's Social Security Number and their Date of Birth, select their Gender, and input any available option information.



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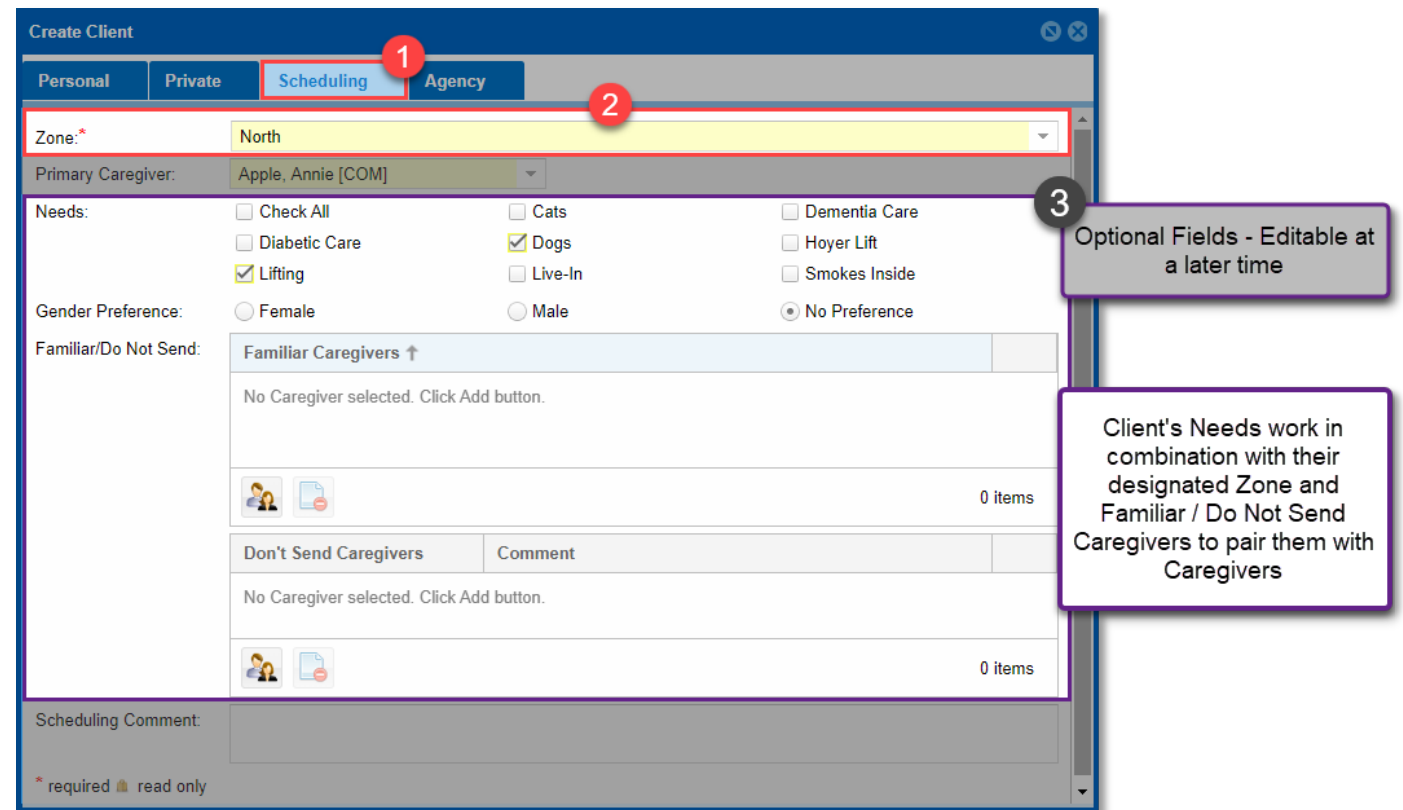
Optional Fields - Editable at a later time

* required 🔒 read only

Adding a Client – Schedule Information

From the Scheduling tab, you must select the Client's service Zone and Case Owner. You may then enter in any available optional information.

- Clients are assigned to one zone; this selection will be used to match them with Caregivers that service their area.
- The Needs on the Scheduling tab will be used to match the client up with the Caregiver's Skills. If the caregiver does not have a particular client need, a warning will generate when assigning the visit (if enabled).



Create Client

Personal Private **Scheduling** Agency

Zone:* North

Primary Caregiver: Apple, Annie [COM]

Needs:

<input type="checkbox"/> Check All	<input type="checkbox"/> Cats	<input type="checkbox"/> Dementia Care
<input type="checkbox"/> Diabetic Care	<input checked="" type="checkbox"/> Dogs	<input type="checkbox"/> Hoyer Lift
<input checked="" type="checkbox"/> Lifting	<input type="checkbox"/> Live-In	<input type="checkbox"/> Smokes Inside
Gender Preference:	<input type="radio"/> Female	<input type="radio"/> Male
		<input checked="" type="radio"/> No Preference

Familiar/Do Not Send: Familiar Caregivers ↑

No Caregiver selected. Click Add button.

0 items

Don't Send Caregivers

Comment

No Caregiver selected. Click Add button.

0 items

Scheduling Comment:

* required read only

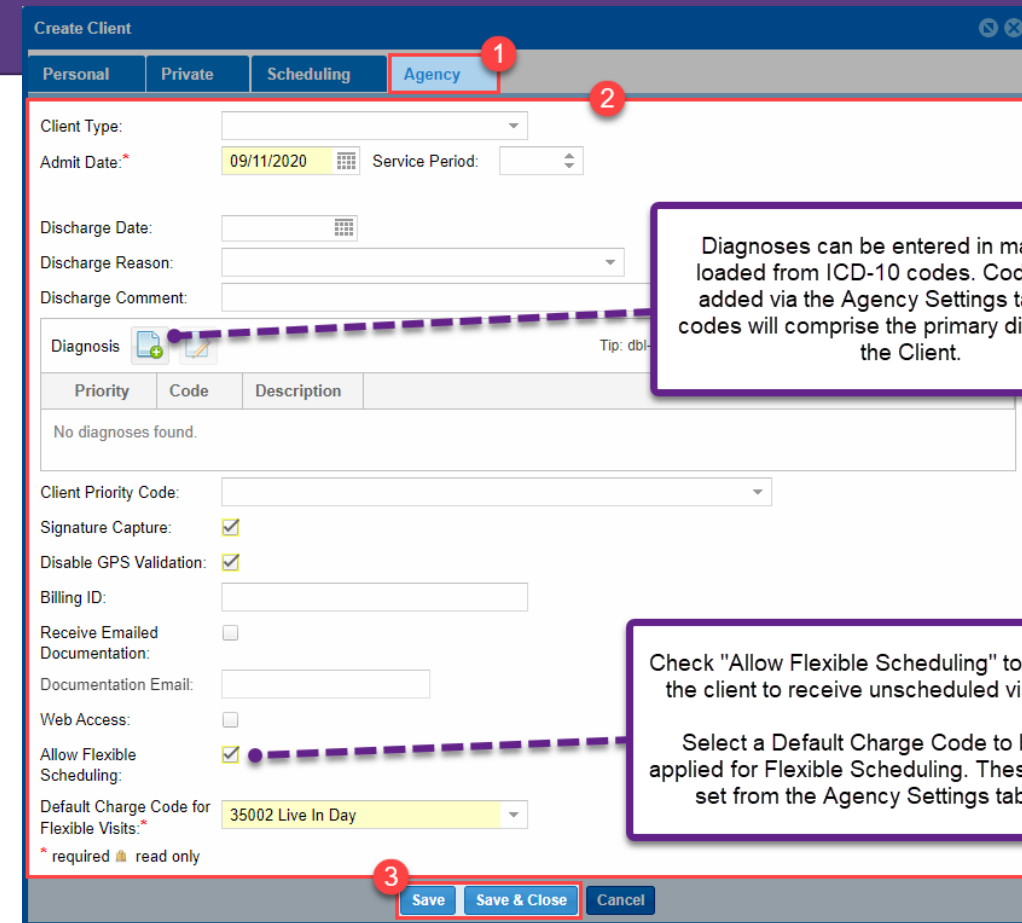
Optional Fields - Editable at a later time

Client's Needs work in combination with their designated Zone and Familiar / Do Not Send Caregivers to pair them with Caregivers

Adding a Client – Agency Information

Finally, from the Agency tab, input any available information in the provided fields. Once complete, click Save and Close.

- The client type refers to the payer – often this is Private Duty, LTCI, or Medicaid.
- List any diagnoses or client priority information necessary
- Diagnoses codes can either be entered as ICD codes or freeform
- Allow Flexible scheduling should be checked off to allow the client to receive unscheduled visits



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Diagnoses can be entered in manually, or loaded from ICD-10 codes. Codes can be added via the Agency Settings tab. These codes will comprise the primary diagnoses for the Client.

Check "Allow Flexible Scheduling" to allow the client to receive unscheduled visits.

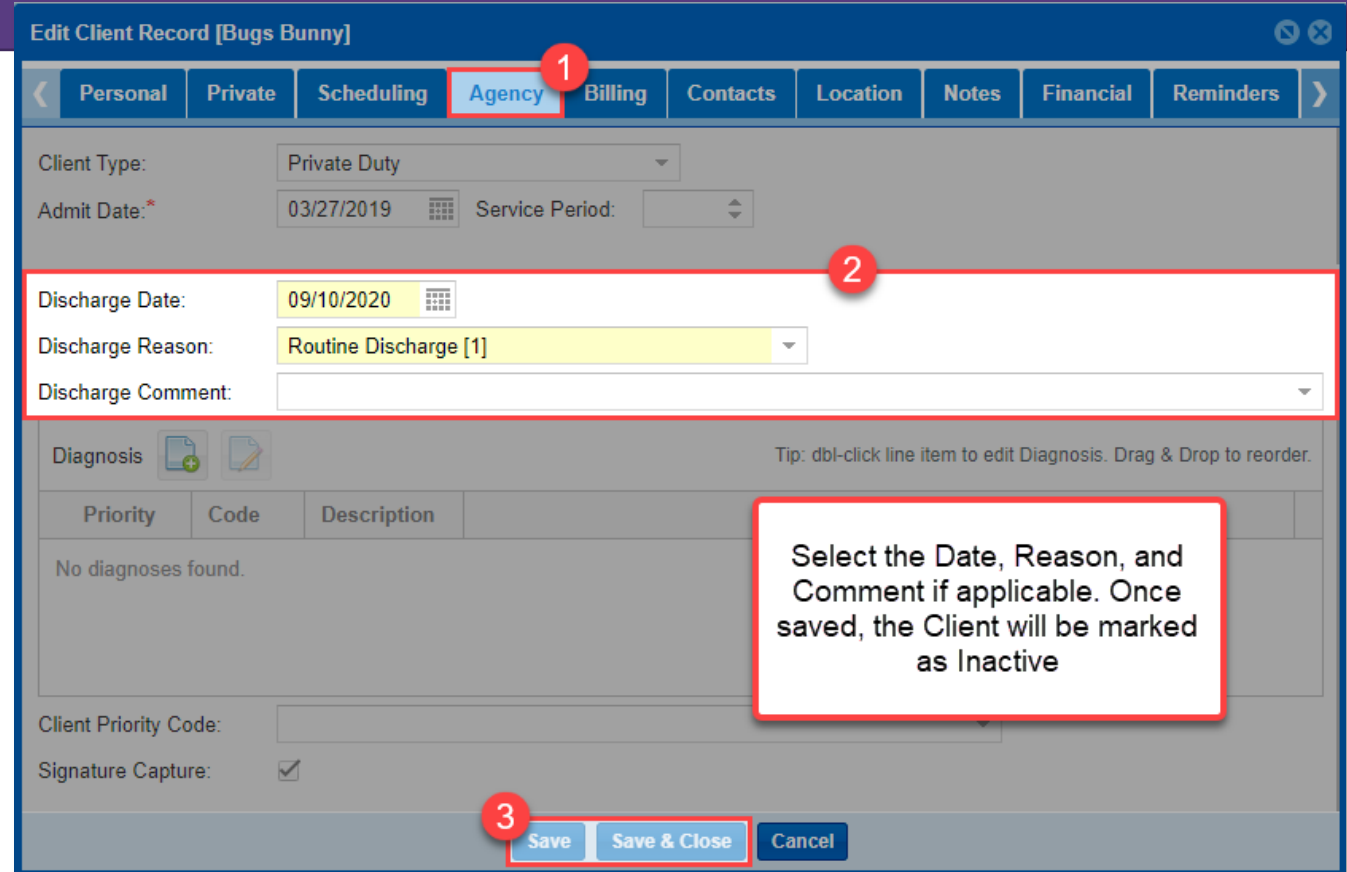
Select a Default Charge Code to be applied for Flexible Scheduling. These are set from the Agency Settings tab.

Inactivating a Client

Inactivating a Client in CareWhen is straightforward as well. Simply click into the client and then select the discharge date and reason on the Agency tab.

Once inactivated:

- Any active orders will end
- Caregivers will not be able to check in or out for that client
- When looking at client reports, you can elect to include inactive caregivers or exclude them



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Tip: dbl-click line item to edit Diagnosis. Drag & Drop to reorder.

Select the Date, Reason, and Comment if applicable. Once saved, the Client will be marked as Inactive