



CareWhen Lite Training

CareWhen Configuration



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.

CareWhen Configuration

Before importing or adding clients and caregivers in CareWhen, selecting your settings and configuration preferences are crucial to the smooth operation of CareWhen for your business.

**System
Defaults**

**Menu
Dropdowns**

**Communication
Setup**

**User
Management**

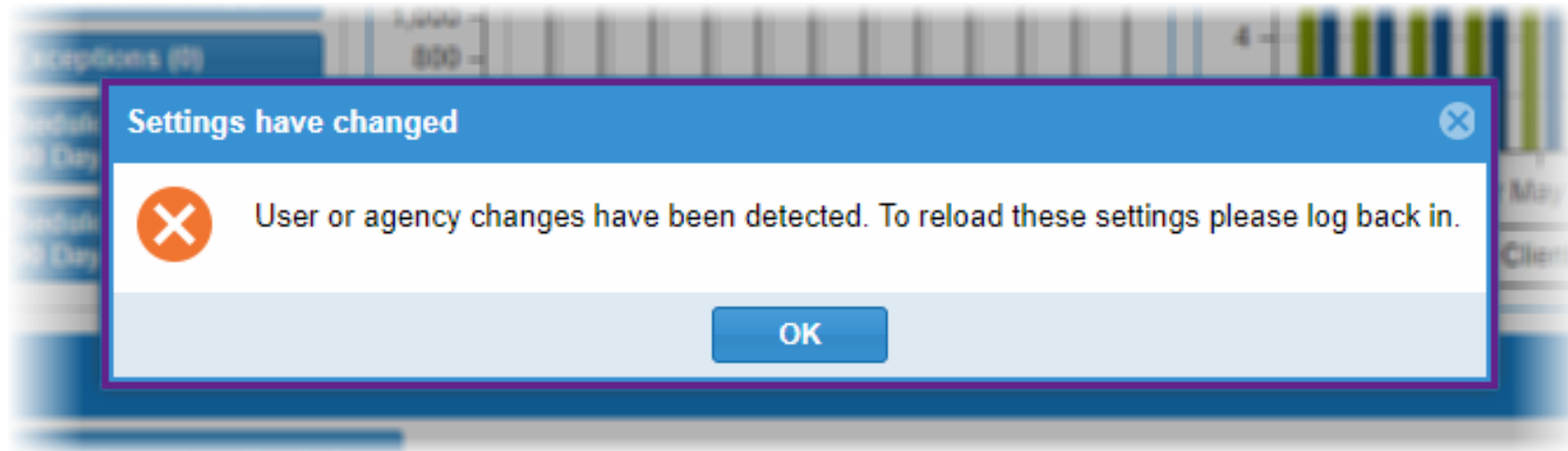
**Clockwork /
EVV Setup**



Configuration settings in CareWhen Lite will be set by DWIHN. These settings and more are accessible to agencies that have upgraded to the full version of CareWhen.

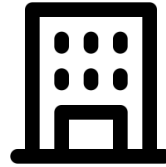
CareWhen Configuration

Note: Making changes to Configuration settings that alter input fields found throughout the site will prompt a Logout after your changes have been saved. When the prompt appears, click OK to log out and log back in.



System Defaults

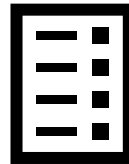
System defaults control how CareWhen operates to reflect your business operations



Identify Agency offices & zones



Establish Client Types



Set Skill Types and Levels

System Defaults



Primary & Additional Offices

Enter the Agency office information on the Primary Office tab under Agency Info. Additional office locations can be added on the Additional Offices tab.

Configuration Notes

- The email address entered will be used for customer service communications, as well as for billing information.
- The tax ID and last month of the fiscal year will be set up by AssuriCare



AssuriCare

Home Scheduler Clients Caregivers Reports Tasks Messages **Settings** Help

Agency Settings

- Agency Info
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging
- Agency Logo

Maintenance

- Agency Tables
- Charge Codes
- Payment Codes
- Adjustment Codes
- Education Codes
- Diagnosis Codes
- Note Types
- Type Of Service
- Discharge Reasons
- Document Categories
- GL Codes

Users & Roles

- Agency Roles
- Agency Users
- Doctors

Agency Info

Primary Office Additional Offices Client Face Sheet

Company: AssuriCare

Address: 100 5th Ave

Address 2:

City: Waltham State/Pr: Massachusetts Postal Code: 02451-8703

Email:

Comment:

Phones

Prior...	Name	Number	Memo
No phones found.			

Tax ID: 99-9999999

Last Month of Fiscal Year: December

* Required.

Call August Systems to update.

System Defaults



Client Face Sheet

The Client Face Sheet allows Agencies to design and customize an information sheet on an individual client to provide to Agency staff or caregivers.

Configuration Notes

- Check off the fields that you would like to be included on the Client Information Sheet and click the save button
- The Name Format dropdown allows you to pick how you would like the client name to show on the Client Face Sheet



AssuriCare

Scheduler Clients Caregivers Reports Tasks Me **Settings** Help

Agency Settings

- Agency Info
- Configuration
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- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging
- Agency Logo

Maintenance

- Agency Tables
- Charge Codes
- Payment Codes
- Adjustment Codes
- Education Codes
- Diagnosis Codes
- Note Types
- Type Of Service
- Discharge Reasons
- Document Categories
- GL Codes

Users & Roles

- Agency Roles
- Agency Users
- Doctors
- Referral Sources

Reminders

- Client
- Caregiver

Client Services

Agency Info

Primary Office Additional **Client Face Sheet**

Name Format: Full Name

Client Id: ☒

Address: ☒

Phone Number: ☒

Gender: ☒

Birth Date: ☐

Social Security: ☐

Marital Status: ☒

Admit Date: ☒

Service Period: ☒

Client Type: ☒

Gender Preference: ☒

Subscribers: ☒

Primary Caregiver: ☒

Special Needs: ☒

Primary Doctor: ☒

Diagnosis: ☐

Contacts: ☒

Directions: ☒

Billing Id: ☒

* required read only

System Defaults



Zones

Zones are defined by the Agency and are often either geographical areas or represent unique tax IDs if your Agency has multiple corporate entities. Clients are assigned to one zone, whereas caregivers are assigned to any zones that they will accept assignments within. This is used to help ensure schedulers do not assign a caregiver who is not in the same zone as the client to the client's visit.

The screenshot shows the CareWhen? software interface. The top navigation bar includes tabs for Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red box and a red circle with the number 1), and Help. The left sidebar contains a tree view of settings categories: Agency Settings, Agency Info, Configuration, Zones (highlighted with a red box and a red circle with the number 2), Client Types, Field Setup, Skill Levels, Skill Type, and Text Messaging. The main content area displays the 'Zones' configuration page. At the top of this page are two icons: a document icon (highlighted with a red circle with the number 5) and a document with a plus sign icon (highlighted with a red circle with the number 3). Below these icons is a table with two columns: 'Zone Code' and 'Description'. The table contains three rows: 'N' for 'North', 'S' for 'South', and 'WST' for 'West'. A red box highlights the table, and a red circle with the number 4 points to the table area.

Zone Code	Description
N	North
S	South
WST	West

System Defaults



Client Types

Client Types are used to organize clients into certain groups that are used in Reporting.

Configuration Notes

- Client Types cannot be deleted after they have been used.
- Reports can be customized or filtered by client type.
- Common types include Private Duty, Medicaid, and LTCI.

Client Type Code	Name
Private	Private Duty
Medicaid	Medicaid
LTC	Long Term Care

System Defaults

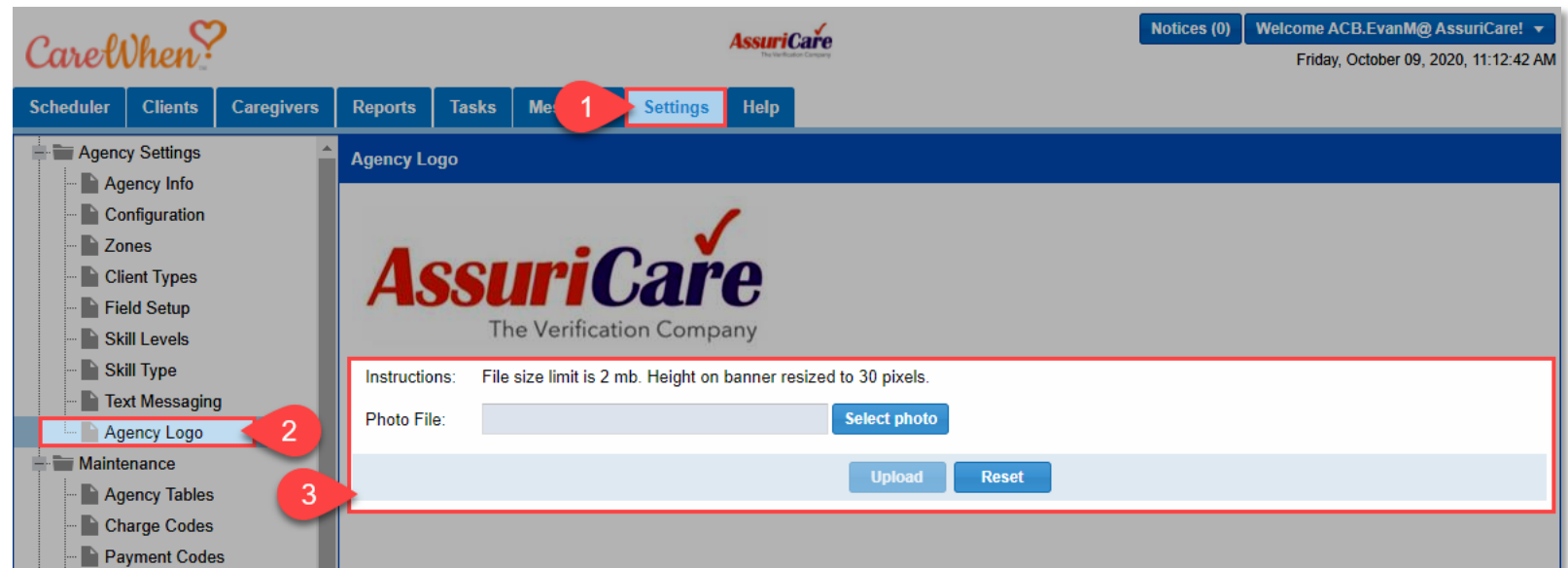


Agency Logo

If desired, you can upload your Agency's logo to display in CareWhen.

Configuration Notes

- To add a logo, click Select Photo and select your logo from your computer files. Click Upload to save the logo in CareWhen.
- Note that the format must be jpeg or png.
- This will show on any manually generated invoices as well.

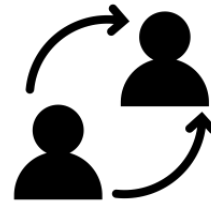


Menu Dropdowns

You can customize the dropdown menus across the platform to reflect the common options that your business uses



Set user contact relationship types



Manage referral source options



Curate cancellation and discharge options

Menu Dropdowns

Agency Tables: Contact Relationship

Various kinds of contacts can be saved in a Client or Caregiver's "Contacts Tab"; the Contact Relationship tab in Maintenance Settings allows you to enter in contact types that are available on those tabs.

For Example...

- Contact Relationship types can include Spouse, Care Monitor, Mother / Father, Son / Daughter, etc.

1 Settings

2 Agency Tables

3 Contact Relationship

4

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active	
Spouse	✓	✗
Mother	✓	✗
Daughter	✓	✗
Son	✓	✗
Father	✓	✗
Neighbor	✓	✗

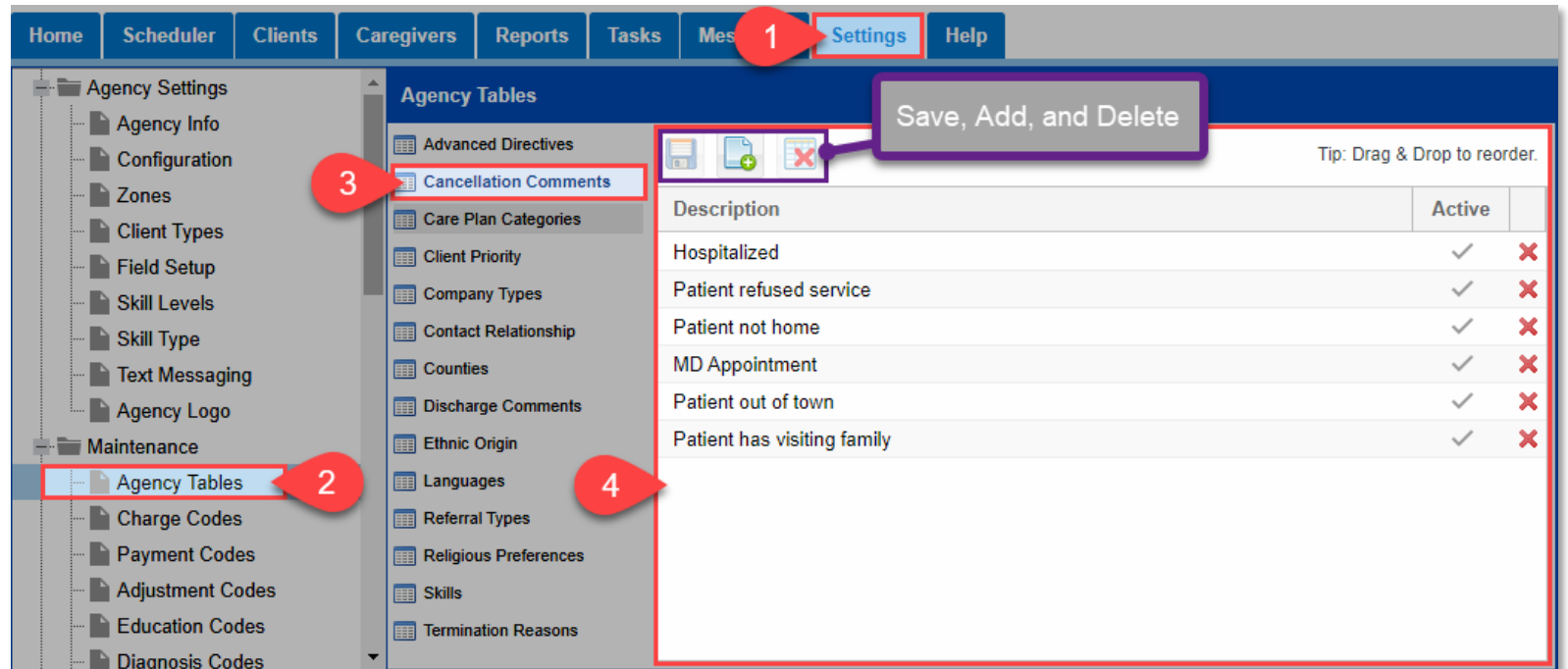
Menu Dropdowns

Agency Tables: Cancellation Comments

Cancellation comments are required whenever a visit is cancelled. The Cancellation Comments table allows Agencies to manage the available comments associated with visit cancellation.

Configuration Notes

- Additional Cancellation Comments can be added from this table after setup.



The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and number 1), and Help. On the left, a sidebar menu lists various configuration categories: Agency Settings (Agency Info, Configuration, Zones, Client Types, Field Setup, Skill Levels, Skill Type, Text Messaging, Agency Logo), Maintenance (Agency Tables, Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes), and Agency Tables (highlighted with a red circle and number 2). The Agency Tables section is expanded, showing a list of tables: Advanced Directives, Cancellation Comments (highlighted with a red circle and number 3), Care Plan Categories, Client Priority, Company Types, Contact Relationship, Counties, Discharge Comments, Ethnic Origin, Languages (highlighted with a red circle and number 4), Referral Types, Religious Preferences, Skills, and Termination Reasons. The Cancellation Comments table is open, showing a table with columns for Description, Active, and a delete icon. The table contains six rows of cancellation comments. A purple box labeled 'Save, Add, and Delete' is positioned above the table, and a tip 'Tip: Drag & Drop to reorder.' is visible in the top right corner of the table area.

Description	Active	
Hospitalized	✓	✗
Patient refused service	✓	✗
Patient not home	✓	✗
MD Appointment	✓	✗
Patient out of town	✓	✗
Patient has visiting family	✓	✗

Menu Dropdowns



Agency Tables: Company Types

Set the company-type designation options available when entering referral sources. These serve as a further narrowing down of the Referral Types category.

For Example...

- Company Types can include hospitals, assisted living facilities, social media, or radio stations.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and callout 1), and Help. The left sidebar shows a tree view of settings categories, with 'Agency Tables' (callout 2) selected under 'Agency Settings'. The 'Agency Tables' list includes items like Advanced Directives, Cancellation Comments, Care Plan Categories, Client Priority, Company Types (callout 3), Contact Relationship, Counties (callout 4), Discharge Comments, Ethnic Origin, Languages, Referral Types, Religious Preferences, Skills, and Termination Reasons. The right pane shows the 'Save, Add, and Delete' interface for 'Company Types', featuring a table with columns for Description and Active status. A tip at the top right says 'Tip: Drag & Drop to reorder.' The table contains one entry: 'Home Care' with an active status indicated by a checkmark and a delete icon (X).

Description	Active
Home Care	✓ X

Menu Dropdowns



Referral Sources

You can create a list of referral sources to track how clients or caregivers come to your Agency. The referral source will show on the client and caregiver records to tag each as to how they were referred (if applicable).

Configuration Notes

- Both Company Types and Referral Types need to be defined in the Agency Tables before adding a Referral Source
- An example of a referral source could be Sally Smith, a former caregiver.

Menu Dropdowns



Agency Tables: Skills

Use the Skills tab to manage a list of various “skills” available to add on a Caregiver’s record. These skills will also show as “Needs” on a Client’s record. When checked on a Caregiver record, it indicates that the Caregiver can perform that skill. When checked on a Client’s record, it indicates that the Client needs someone who can perform that skill.

Configuration Notes

- If “Disable Skills v. Needs” is checked in the Agency Settings area, there will be no limitations on assigning Caregivers to Clients based on matching skills.

The screenshot shows the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and number 1), and Help. The left sidebar shows a tree view of settings, with 'Agency Tables' (highlighted with a red circle and number 2) selected under the 'Maintenance' category. The 'Agency Tables' panel on the right lists various tables, with 'Skills' (highlighted with a red circle and number 3) selected. The 'Skills' table is displayed, showing columns for Description, Active, and a checkbox. The table contains the following data:

Description	Active	
Dementia Care	✓	
Diabetic Care	✓	
Hoyer Lift	✓	
Lifting	✓	
Cats	✓	
Dogs	✓	
Live-In	✓	
Smokes Inside	✓	

A callout box with the text 'Save, Add, and Delete' points to the table controls (highlighted with a red circle and number 4). A tip at the top right of the table states 'Tip: Drag & Drop to reorder.'

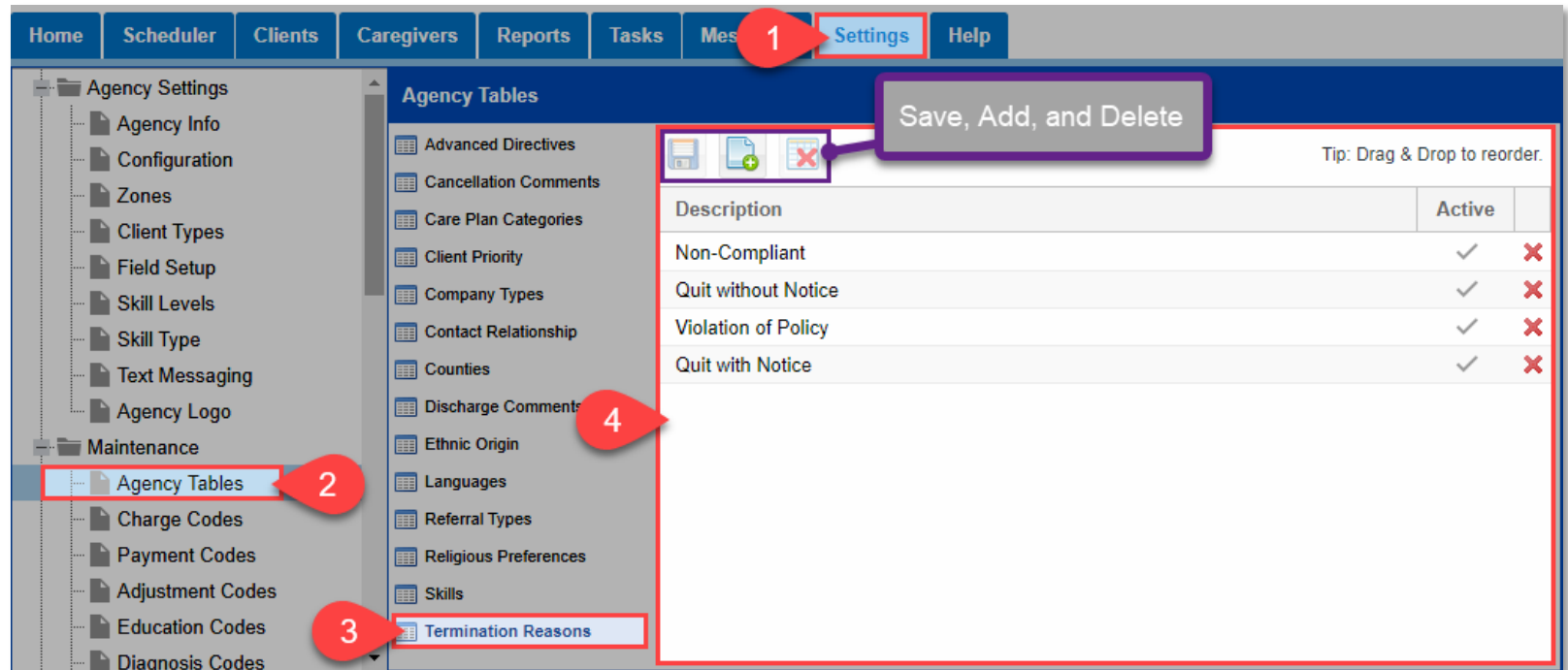
Menu Dropdowns

Agency Tables: Termination Reasons

When removing a Caregiver from an Agency, the option will be available to leave a Termination Reason. Use the Termination Reason table to curate a list of selectable reasons.

For Example...

- Some examples of removal reasons include:
 - Non-Compliant
 - Quit without Notice
 - Violation of Policy
 - Quit with Notice



The screenshot shows the AssuriCare web application interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and number 1), and Help. The left sidebar contains a tree view of settings categories, with 'Agency Tables' highlighted (red circle and number 2). The main content area displays the 'Agency Tables' section, listing various tables. 'Termination Reasons' is highlighted at the bottom (red circle and number 3). A table titled 'Save, Add, and Delete' is shown, containing a list of termination reasons. The table has columns for 'Description', 'Active', and a delete icon (red circle and number 4). The table data is as follows:

Description	Active	
Non-Compliant	✓	✗
Quit without Notice	✓	✗
Violation of Policy	✓	✗
Quit with Notice	✓	✗

A tip at the top right of the table states: 'Tip: Drag & Drop to reorder.'

Menu Dropdowns



Discharge Reasons

The Discharge Reasons table contains approved discharge reasons that are used when a Client is *ending* service. Reasons can be added, edited, or deleted here.

Discharge Reasons

☐ Show Inactive

Description	Code	Active	
Admitted to Hospital	2	✓	✗
Expired	20	✓	✗
Expired at Home	40	✓	✗
Expired Hospital, SNF, ICF	41	✓	✗
Expired Place Unknown	42	✓	✗
Left Against Advice	7	✓	✗
Routine Discharge	1	✓	✗
Still Patient	30	✓	✗
To Hospice - Home	50	✓	✗
To Hospice – Medical Facility	51	✓	✗

Menu Dropdowns



Agency Tables: Discharge Comments

Discharge comments are required whenever a Client is discharged. The Discharge Comments table allows Agencies to manage the available comments associated with Client discharge.

Configuration Notes

- Additional Discharge Comments can be added from this table after setup.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red box and a red circle labeled '1'), and Help. On the left, a sidebar menu shows 'Agency Settings' and 'Maintenance'. Under 'Maintenance', 'Agency Tables' is highlighted with a red box and a red circle labeled '2'. The main area, titled 'Agency Tables', lists various tables. 'Discharge Comments' is highlighted with a red box and a red circle labeled '3'. A red circle labeled '4' points to the 'Discharge Comments' table in the list. To the right of the table list, a 'Save, Add, and Delete' button is shown with a red box. Below this, a table displays the configuration for 'Discharge Comments'.

Description	Active	
Deceased	✓	✗
Moved out of Service Area	✓	✗

Tip: Drag & Drop to reorder.

Menu Dropdowns Optional Tables

In addition to the primary tables we recommend, you can customize these optional tables to provide drop downs for additional information on the Client and Caregiver records



Add Personal and Private information options



Set Client Disaster Priority



Manage Client Diagnosis Codes



Add language, religious preference, and ethnicity options

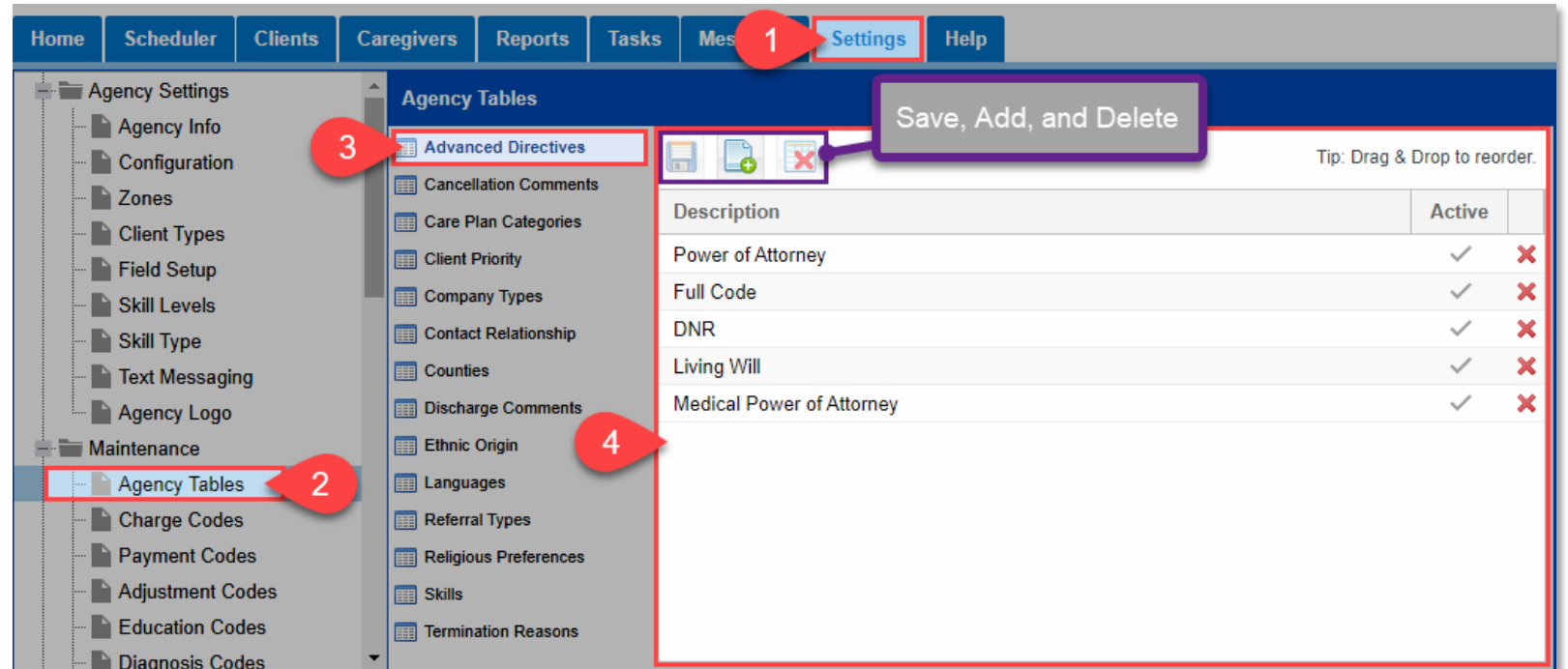
Menu Dropdowns (Optional)

Agency Tables: Advanced Directives

Items entered in the Advanced Directives table will be used from a Client's "Private" Tab to help designate preferred care. Items entered here also appear on the Client Record page.

For Example...

- Types of Advanced Directives could include:
 - POA
 - DNR
 - HealthCare Surrogate



The screenshot shows the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and number 1), and Help. The left sidebar contains a tree view with categories like Agency Settings, Maintenance, and Agency Tables (highlighted with a red circle and number 2). Under Agency Tables, the Advanced Directives table is selected (highlighted with a red circle and number 3). The main content area displays the Advanced Directives table with columns for Description, Active, and a checkbox. The table contains five rows: Power of Attorney, Full Code, DNR, Living Will, and Medical Power of Attorney. A purple box labeled "Save, Add, and Delete" with icons is positioned above the table. A tip "Tip: Drag & Drop to reorder." is visible. A red circle with number 4 points to the table's data area.

Description	Active	
Power of Attorney	✓	✗
Full Code	✓	✗
DNR	✓	✗
Living Will	✓	✗
Medical Power of Attorney	✓	✗

Menu Dropdowns (Optional)



Diagnosis Codes

Agencies can search ICD codes, published by CMS, and add them to the Diagnosis Codes table. The contents of this table are used in the dropdown list found on the Client record.

Configuration Notes

- The diagnosis description can be modified if desired.
- If preferred, an Agency may enter diagnosis free-form text description.

Diagnosis Codes

Search:

DX Code	Description
E11.9	Type 2 diabetes mellitus without complications
I50.9	Heart failure, unspecified
J44.9	Chronic obstructive pulmonary disease, unspecified
N31.2	Flaccid neuropathic bladder, not elsewhere classified
Z46.6	Encounter for fitting and adjustment of urinary device
Z74.1	Need for assistance with personal care
Z74.2	Need for assist at home & no house memb able to render care
Z74.3	Need for continuous supervision
Z74.8	Other problems related to care provider dependency

Page 1 of 1 | Page Size: 25 | Displaying 1 - 9 of 9

Menu Dropdowns (Optional)



Agency Tables: Client Priority

The Client Priority table is used by Agencies to classify disaster priority for Clients, as is required in some states. This is intended to prioritize those who need care the most.

Configuration Notes

- If an Agency had a Caregiver shortage due to a natural disaster, this would inform them which clients cannot go without help.

The screenshot shows the AssuriCare software interface. The top navigation bar includes 'Home', 'Scheduler', 'Clients', 'Caregivers', 'Reports', 'Tasks', 'Messages', 'Settings' (highlighted with a red box and callout 1), and 'Help'. The left sidebar contains a tree view of settings categories: 'Agency Settings' (with sub-items: Agency Info, Configuration, Zones, Client Types, Field Setup, Skill Levels, Skill Type, Text Messaging, Agency Logo), 'Maintenance' (with sub-items: Agency Tables, Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes), and 'Agency Tables' (highlighted with a red box and callout 2). The 'Agency Tables' section lists various tables: Advanced Directives, Cancellation Comments, Care Plan Categories, Client Priority (highlighted with a red box and callout 3), Company Types, Contact Relationship, Counties, Discharge Comments, Ethnic Origin, Languages, Referral Types, Religious Preferences, Skills, and Termination Reasons. The 'Client Priority' table is selected, showing a table with columns 'Description', 'Active', and a checkbox. The table contains three rows: 'Priority 1 Must have care no other available' (Active: checked), 'Priority 2 Other caregiver available in emergency' (Active: checked, with a red 'X' in the checkbox), and 'Priority 3 Family in home w/notice will provide' (Active: checked, with a red 'X' in the checkbox). A purple box with the text 'Save, Add, and Delete' and icons is overlaid on the table header, with a callout 4 pointing to it. A tip at the top right of the table says 'Tip: Drag & Drop to reorder.'

Description	Active	
Priority 1 Must have care no other available	✓	
Priority 2 Other caregiver available in emergency	✓	✗
Priority 3 Family in home w/notice will provide	✓	✗

Menu Dropdowns (Optional)



Agency Tables: Counties

The Counties table allows you to set options available to use under a Client's "Personal Tab" when setting up or editing their information.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs: Home, Scheduler, Clients, Caregivers, Reports, Tasks, Me, **Settings** (highlighted with a red circle and callout 1), and Help. The left sidebar shows a tree view of settings categories: Agency Settings, Maintenance, and Agency Tables (highlighted with a red circle and callout 2). Under Agency Tables, the 'Counties' table is selected (highlighted with a red circle and callout 3). The main content area, titled 'Agency Tables', lists various tables: Advanced Directives, Cancellation Comments, Care Plan Categories, Client Priority, Company Types, Contact Relationship, **Counties** (highlighted with a red circle and callout 4), Discharge Comments, Ethnic Origin, Languages, Referral Types, Religious Preferences, Skills, and Termination Reasons. A table titled 'Counties' is displayed with columns 'Description', 'Active', and a delete icon. The table contains one entry: 'Kootenai' with a checkmark in the 'Active' column and a red 'X' in the delete column. Above the table are icons for 'Save, Add, and Delete' (highlighted with a purple callout). A tip at the top right of the table area reads: 'Tip: Drag & Drop to reorder.'

Menu Dropdowns (Optional)



Agency Tables: Ethnic Origin

Use the Ethnic Origin tab to curate a list of available ethnicities to add to a Client or Caregiver's record.

1

2

3

4

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active	
African American	✓	✗
Hispanic	✓	✗
Native American	✓	✗
Chinese	✓	✗
Caucasian	✓	

Menu Dropdowns (Optional)



Agency Tables: Languages

Use the Languages tab to curate a list of available languages to add to a Client or Caregiver's record.

1 Settings

2 Agency Tables

3 Languages

4

Save, Add, and Delete

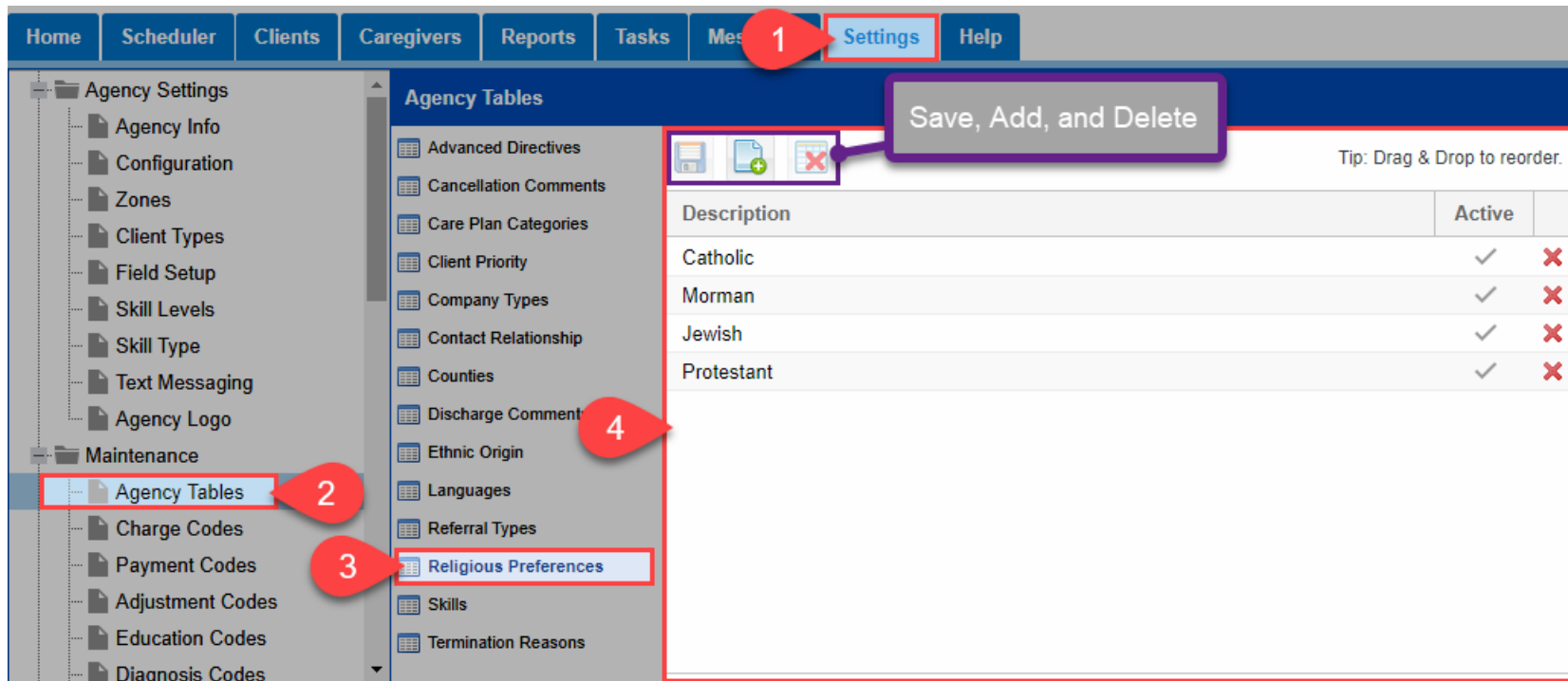
Tip: Drag & Drop to reorder.

Description	Active	
German	✓	✗
English	✓	
Spanish	✓	✗
French	✓	✗
Russian	✓	✗
Vietnamese	✓	✗
Mandarin	✓	✗

Menu Dropdowns (Optional)

Agency Tables: Religious Preferences

Use the Religious Preferences tab to curate a list of available religions to add to a Clients record.



1

Settings

Agency Tables

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active	
Catholic	✓	✗
Mormon	✓	✗
Jewish	✓	✗
Protestant	✓	✗

2

3

4

Communication Setup

Communication Setup controls how CareWhen communicates to clients, caregivers, and AssuriCare will operate



Design document categories



Configure note types



Build default text messages for available visits

Communication Setup



Text Messaging

With CareWhen you can send text messages to caregivers to offer them visits. You can customize the text message language, as well as set forwarding schedules for replies to those messages to go to a specific Agency staff member by email. This page is also used to set Out of Office text responses that are sent to Caregivers attempting to communicate with an Agency after hours.

Configuration Notes

- The text message language saved here will become the default message, but when you send out individual messages you will have the option to change it for that individual.



Communication Setup



Note Types

Use the Note Types tab to add and edit customized notes pertaining to Agency needs such as “General”, “Compliment”, “Complaint”, “Prospect”, and “Emergency Preparedness”.

Configuration Notes

- Use the Allowed Roles column to control which Agency Roles can view each note type within CareWhen.

1 Settings

2 Note Types

3

Allowed roles dictate which type of Agency users can see certain note types.

Can Delete dictates which type of Agency users can delete the selected note types.

Name ↑	Code	Allowed Roles	Can Delete	Active
Billing	BILL	CareWhen Lite, Default Admin		✓
Client Request	CLIENT	CareWhen Lite, Default Admin		✓
Complaint	COMP	CareWhen Lite, Default Admin		✓
Compliment	KUDO	CareWhen Lite, Default Admin		✓
Family Request	FAMILY	CareWhen Lite, Default Admin		✓
Human Resources	HR	CareWhen Lite, Default Admin		✓
Other	OTH	CareWhen Lite, Default Admin		✓
Payroll	PAY	CareWhen Lite, Default Admin		✓

Communication Setup



Document Categories

The Document Categories table is used to maintain a list for classifying documents that are uploaded into the system for either Caregivers or Clients. Categorizing documents makes searching for them easier, and Visit Categories are used for document uploads in the CareWhen Mobile App.

Configuration Notes

- When adding or editing document categories, toggle items in the Role table to select roles that can view each document type.

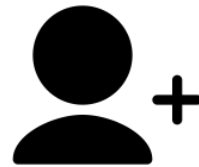
The screenshot displays the AssuriCare web application interface. The top navigation bar includes links for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and number 1), and Help. On the left, a sidebar menu shows various configuration options under 'Agency Settings' and 'Maintenance', with 'Document Categories' selected (highlighted with a red circle and number 2). The main content area, titled 'Document Categories', features a table with columns for Name, Allowed Roles, and Active status. A red circle and number 3 points to the 'Add' button (document icon with a plus sign) in the top left of this section. Below the table, a modal dialog box titled 'Add Document Category' is open. A red circle and number 4 points to the 'Name' field, which contains 'New Document Category'. The 'Active' checkbox is checked. Below this is a table for selecting roles. A red circle and number 5 points to the 'Add' button at the bottom right of the dialog box.

Name ↑	Allowed Roles	Active
Certifications	Admin1, Caregiver Limited View, Default Admin, HR, Scheduler	✓
Other	Admin1	✓
Timesheets	Admin1	✓
Visit	Admin1	✓

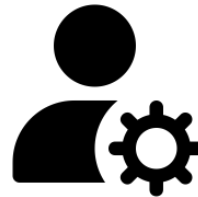
Role (check to enable)	Read Only
<input checked="" type="checkbox"/> Admin1	<input type="checkbox"/>
<input checked="" type="checkbox"/> Caregiver Limited View	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Default Admin	<input type="checkbox"/>
<input type="checkbox"/> HR	<input type="checkbox"/>
<input type="checkbox"/> Scheduler	<input type="checkbox"/>

User Management allows you to define user roles for your Agency and create and manage new users

User Management



Add new users



Manage users

User Management



Agency Users

You can add and update your users within the Agency Users tab. Each user will be assigned a role when created.

The screenshot shows the 'Agency Users' interface. A red box labeled '1' highlights the 'Settings' tab in the top navigation bar. A red box labeled '2' highlights the 'Agency Users' link in the left sidebar. A red box labeled '3' highlights the '+ Add User' icon in the top right of the main content area. Below the navigation, there is a search bar and a table of users.

Last Name	First	User N...	Agen...	Is Caregiver	Limit Zone ↑	Active	Last Login Date
		ACB.J...	Admin1			✓	
		ACB.M...	Admin1			✓	09/17/2019 07:54 AM

Configuration Notes

- This tab will show active users by default. Checking Show Inactive will include inactive users, as well. Additionally, Include Caregivers can be toggled on to display Caregivers in this table.
- Agency administrators can also reset passwords or resend account emails from this tab by editing the user.

The screenshot shows the 'Edit User Record [Jenna Ciotti]' window. The 'Personal Info' tab is selected. There are buttons for 'Resent new account email' and 'Reset password'. The 'Active' checkbox is checked. A text box explains that for active users, their password can be reset or account email resent from the Personal tab, and to make an agency user inactive, the 'Active' checkbox should be unchecked.

For Active users, their password can be reset or account email resent from the Personal tab. To make an Agency user Inactive, uncheck "Active".

User Management



Adding a User

When adding a new user, information such as their name, email, username, birth date, and role are required.

Configuration Notes

- The username will populate automatically based on the name entered.
- Users can be limited to a particular zone if they should only see or edit data relating to clients and caregivers assigned to that zone.

New Agency User

Personal Info Private Agency

First Name: * [text box]
Last: * [text box]
Email: * [text box]
Is Caregiver: ☐
User Name: * ACB: [text box] ☒ Active
* required

The User Name will populate based on the name entered above

Make User Schedulable Save Save & Close Cancel

New Agency User

Personal Info Private Agency

Birth Date: * [text box] Age: [text box]
* required 🛡️ read only

The Birth Date will be used in the event of a password reset

Make User Schedulable Save Save & Close Cancel

New Agency User

Personal Info Private Agency

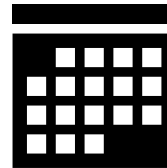
Agency Role: * [dropdown]
Limit By Zone: ☐
* required 🛡️ read only

Limit By Zone will reveal a selection tab allowing a Zone designation for the User

Make User Schedulable Save Save & Close Cancel

Clockwork / EVV Settings

Configure settings pertaining to visit check-in, time tracking, and alerts



Set scheduling and visit parameters for Caregivers



Add clock-in and clock-out prompts

ClockWork / EVV



Options

Use the Options tab to configure a multitude of settings used for both CareWhen mobile app and ClockWork telephony-based EVV.

These settings largely determine what is logged by Caregivers upon check-in and check-out. Some examples of what can be controlled are outlined in blue.

More information...

- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.

The screenshot shows the 'Options' tab for ClockWork/EVV. The left sidebar lists various settings categories, with 'ClockWork/EVV' highlighted. The main content area contains several fields and checkboxes. Callouts provide additional context:

- Callout 1:** Points to the 'Settings' tab in the top navigation bar.
- Callout 2:** Points to the 'Options' tab in the sub-navigation bar.
- Callout 3:** Points to the 'Save' icon (floppy disk) at the top of the form.
- Callout 4:** Points to the 'ClockWork Id' field, which contains the value '10212'. The text states: 'The Agency's pre-set ClockWork ID will be used by Caregivers for Telephony EVV.'
- Callout 5:** Points to the 'Rounding Rule' dropdown menu, which is set to 'Round Both'. The text states: 'If applicable, set rounding settings that are applied to Caregiver Clock-In's to comply with state-specific billing requirements. "Round To Duration" will round Clock-In times up. "Round Duration" will round down. "Round Both" applies both rules.'
- Callout 6:** Points to the 'Use Travel Mileage (TM)' and 'Use Travel Time (TT)' checkboxes. The text states: 'Toggle and set mileage and travel time options that, if applicable, can factor into Caregiver payroll.'
- Callout 7:** Points to the 'Use Tasks' and 'Use Refused Tasks' checkboxes. The text states: 'Toggle whether or not Tasks are captured and logged during EVV check-ins.'

Other visible fields include: 'No Caller ID Number', 'Training Numbers', 'Use TM At Clock In', 'Use TT Before TM', 'Use Errand Mileage', 'Require Response', 'Maximum Miles' (set to 50), 'Bill Over At Scheduled' (with options for Long Term Care, Medicaid, and Private Duty), and 'Minutes More than 24 Hrs' (set to 20).

ClockWork / EVV



Options Continued

Use the Options tab to configure a multitude of settings used for both CareWhen mobile app and ClockWork telephony-based EVV. These settings largely determine what is logged by Caregivers upon check-in and check-out. Some examples of what can be controlled are outlined in blue.

More information...

- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.

Set the window of time at the end of a daily shift that Caregivers will be able to clock-out early or late.

To allow Caregivers to check-in for non-scheduled visits, ensure that Allow Flexible Scheduling has been checked.

Expand Flex visit Client options for Caregivers by including all Clients in Caregivers zone.

Only allow Flex visits for services that a Client is authorized to receive by insurance.

Bill Over At Scheduled: ☐ Developmentally Disabled ☐ Mental Illness ☐ Serious Mental Illness

Minutes More than 24 Hrs:

Minutes Less than 24 Hrs:

Message Voice:

Message Volume:

Restrict Tasks to only those in Care Plan: ☐

Include warning message at Clockout when No Tasks: ☒

Enable Document Capture: ☒

No Clockout without Required Task: ☒

Require comments on Refused Tasks Only: ☐

Require comments on All Tasks: ☒

Allow Flexible Scheduling: ☒

Use associated Zones for Flexible Scheduling: ☒

Restrict Flexible Visits to authorized services: ☒

No start with existing incomplete visit: ☒

Enable clock-in from alternate address: ☒

Enable clock-out from any address: ☒

If an alternate address is setup for a Client, allow for EVV clock-in from that address.

Additionally, allow for clock-out from any address in the event that an order changes location mid-visit.

Note: These options may not be acceptable by certain state EVV regulations.

ClockWork / EVV



Exclusions

Use the Exclusions tab to omit users from utilizing CareWhen / ClockWork EVV.

These users will remain present in the system but will be unable to check-in or check-out using the mobile app or telephony systems.

For Example...

- If utilizing a placeholder Client such as “Office Meeting” or “Travel Time”

The screenshot displays the ClockWork/EVV Settings interface. The top navigation bar includes tabs: Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red box and a red circle with the number 1), and Help. The left sidebar lists various settings categories: Agency Settings, Maintenance, Users & Roles, Reminders, Client Services, ClockWork/EVV (highlighted with a red box and a red circle with the number 2), Export Configurations, Invoicing, Insurance Billing, and Assessments. The main content area is titled 'ClockWork/EVV' and contains several sub-tabs: Opt (highlighted with a red box and a red circle with the number 3), Exclusions (highlighted with a red box), Prompts, Facilities, Late Alerts, and Upcoming. The Exclusions tab is active, showing two sections: 'Exclude Caregivers' and 'Exclude Clients'. Each section has a header 'Exclude the following...' and a message 'No [Caregiver/Client] selected. Click Add button.' Below each message is a list of items, currently showing '0 items'. A purple callout box with an arrow pointing to the person icon in the 'Exclude Clients' section contains the text: 'Use the person icon to select from a list of Agency Caregivers or Clients to exclude.' At the bottom of the interface, there is a legend: '* required' and 'read only'.

ClockWork / EVV



Facilities

If multiple clients are based in a single care facility and share a single contact number, or if multiple clients are based in a single residence, use the Facilities tab to organize the applicable clients under a common Facility and phone number.

The screenshot shows the ClockWork/EVV interface. At the top, a navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, **Settings** (marked with a red circle and '1'), and Help. On the left, a sidebar menu lists various settings categories, with **ClockWork/EVV** (marked with a red circle and '2') selected. The main content area has a sub-navigation bar with Options, Exclusions, **Facilities** (marked with a red circle and '3'), and Late Alerts. A grey instruction box at the top right states: "Add Facilities, add applicable phone numbers, and associate Clients with each Facility." The main area is divided into two panels: "Facility Phone Numbers" and "Facility Clients". The "Facility Phone Numbers" panel shows a dropdown for "Facility: Test Facility" and a table with one entry: (111) 222-3333, which has a red 'X' icon next to it. The "Facility Clients" panel shows a "Select Client" button and a table with two columns: "Client Name ↑" and "Facility ID". It lists "Andrews, Abigail" with "Facility ID" 10. A red-bordered text box on the right explains: "When checking in via ClockWork Telephony for a client associated with a facility, a Caregiver will use the facility phone number, followed by the Client ID, to specify which Client at the facility is being visited." Below this, a note states: "Note: This is not applicable to the CareWhen Mobile App".

When checking in via ClockWork Telephony for a client associated with a facility, a Caregiver will use the facility phone number, followed by the Client ID, to specify which Client at the facility is being visited.

Note: This is not applicable to the CareWhen Mobile App