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

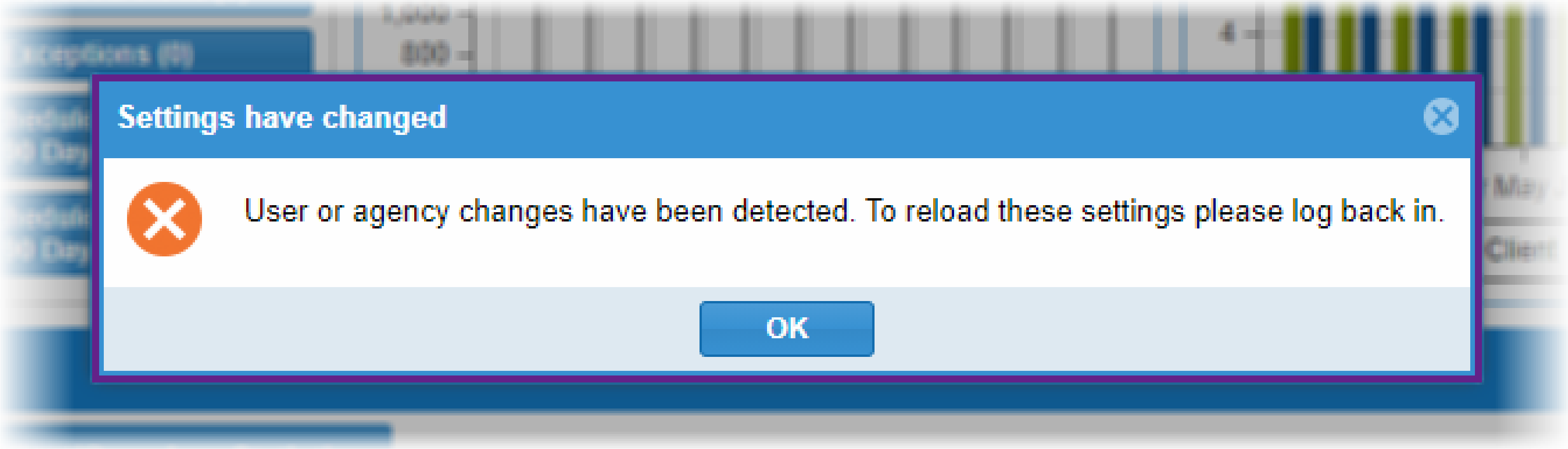
User Management

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

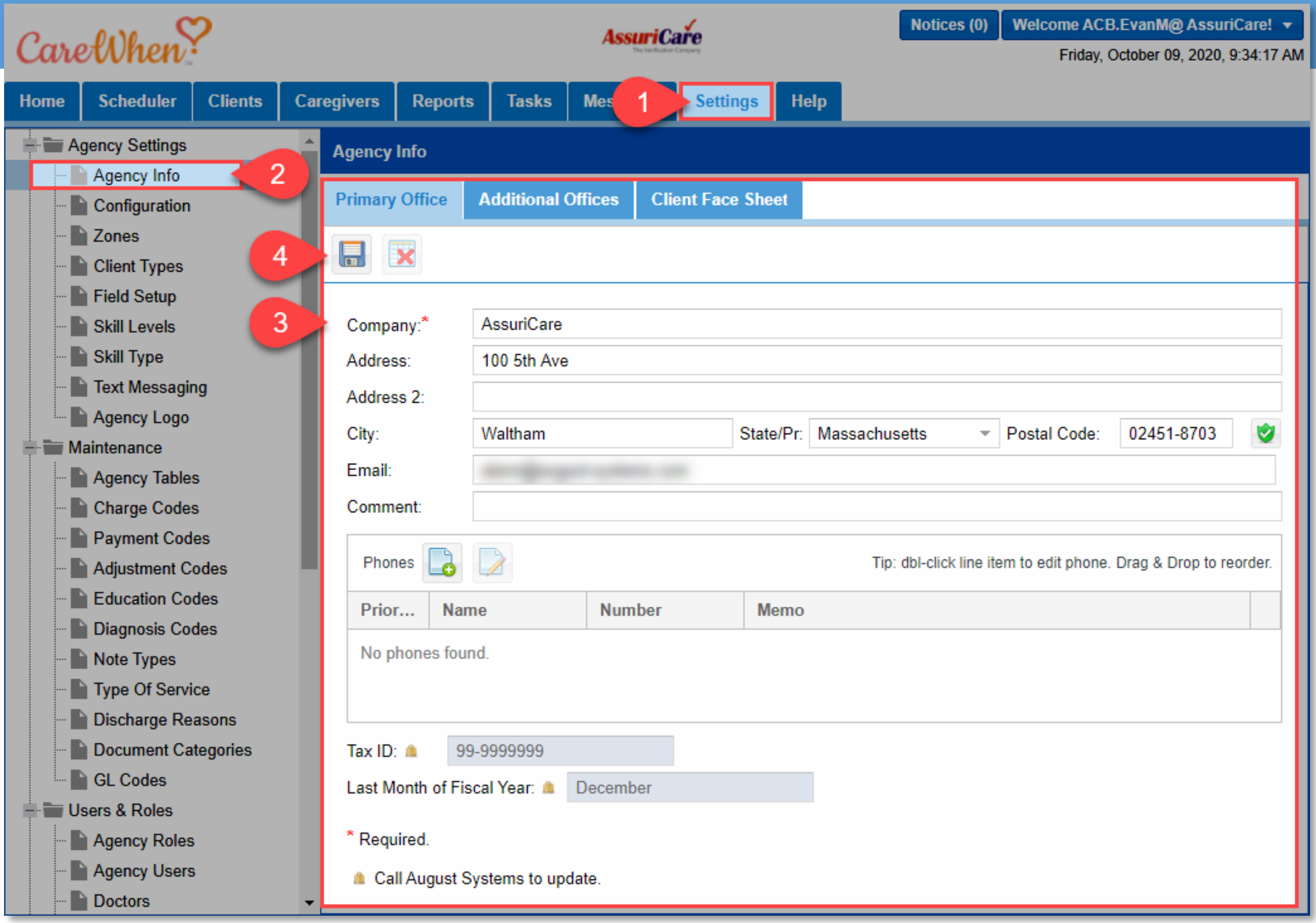
Establish Client Types

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

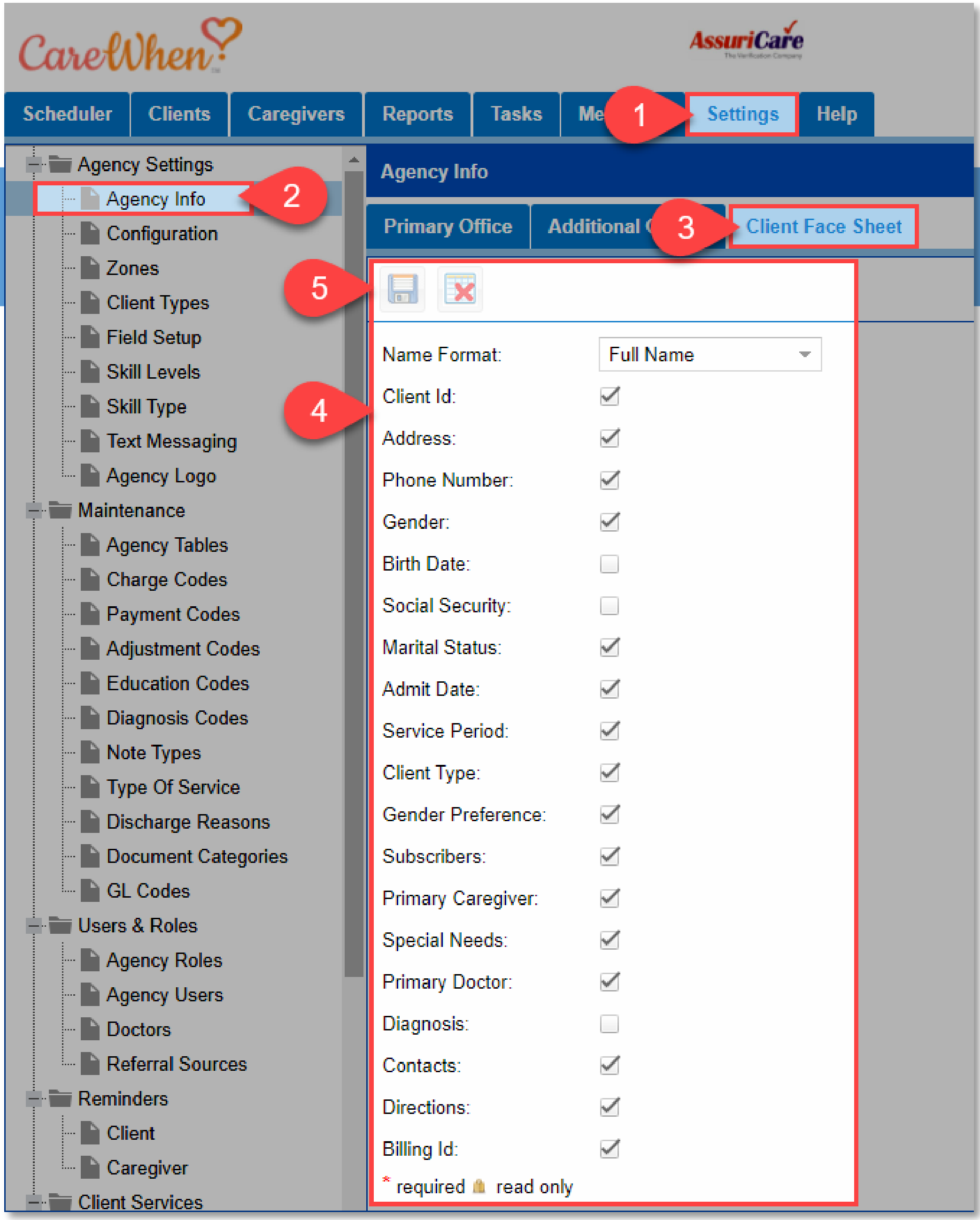
System Defaults

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

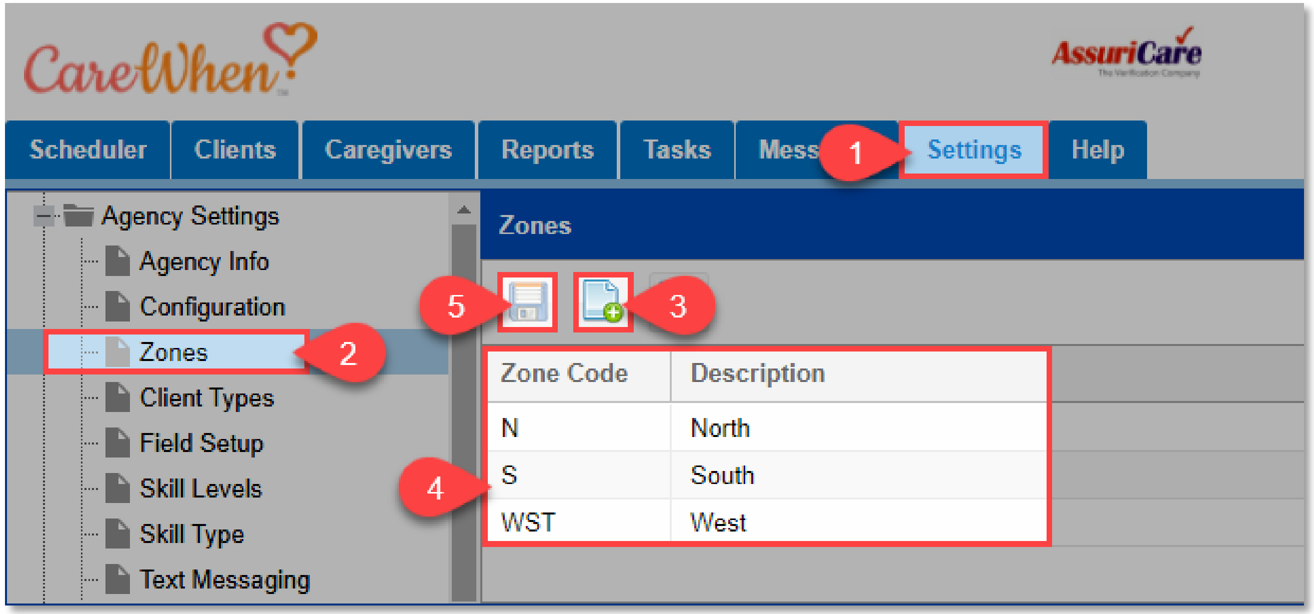


AssuriCare

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 in not in the same zone as the client to the client's visit.



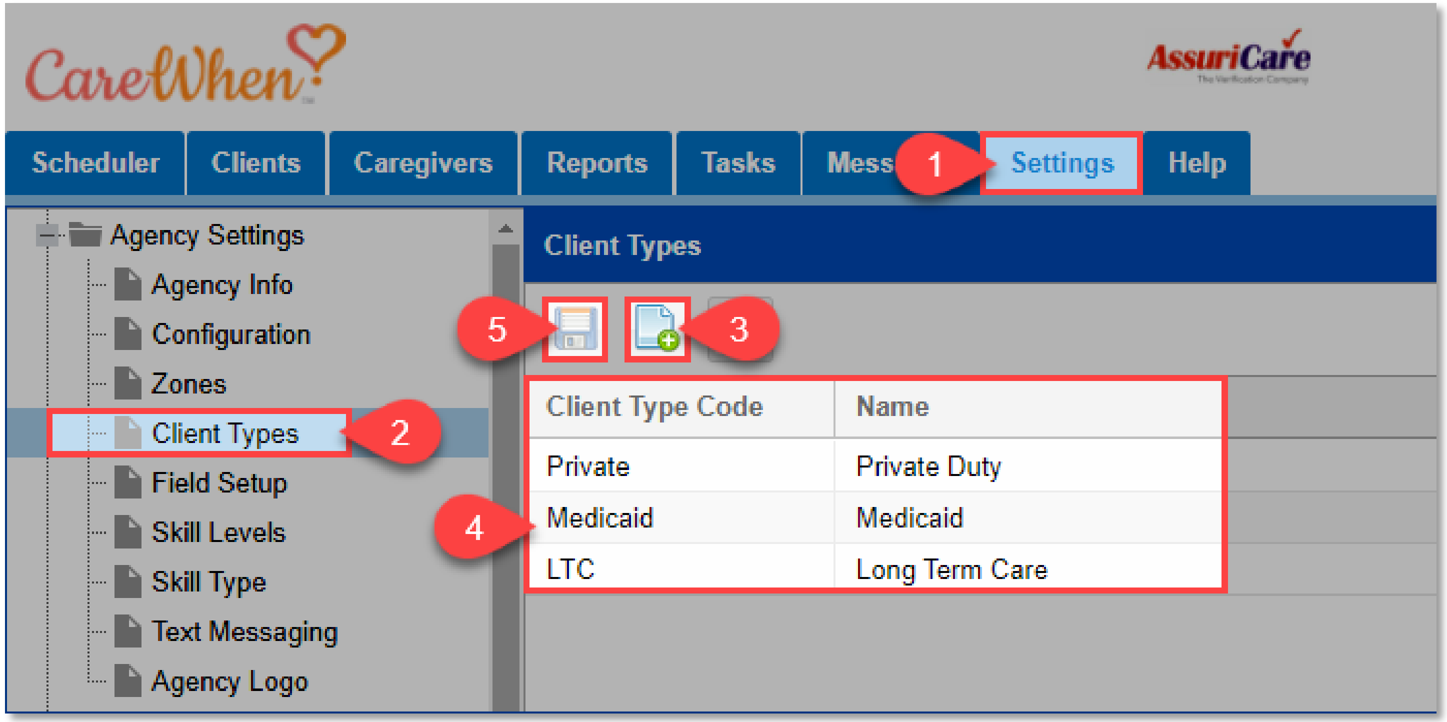
System Defaults

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.



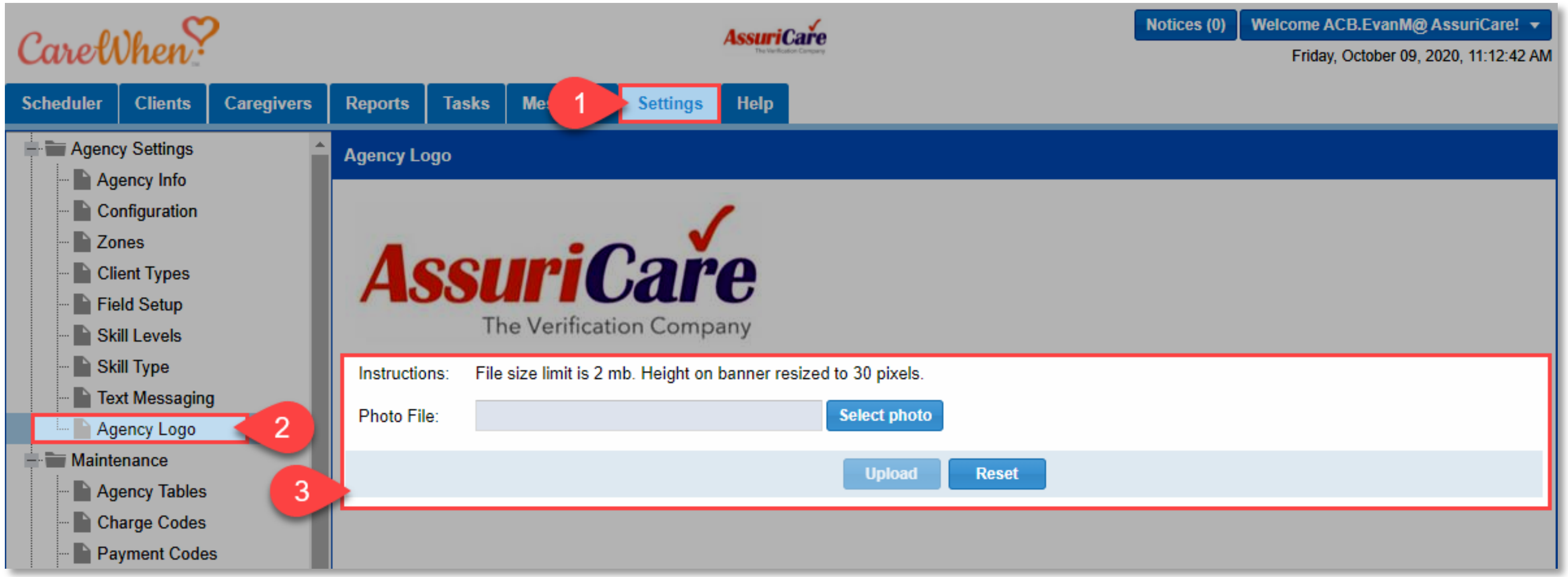
System Defaults

Agency Logo

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

Configuration Notes

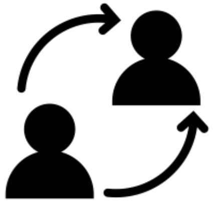
- To add a logo, click Select Photo and select your logo from your computer files. Click Upload to save the logo in CareWhen.
- Note that the format must be jpeg or png.
- This will show on any manually generated invoices as well.



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

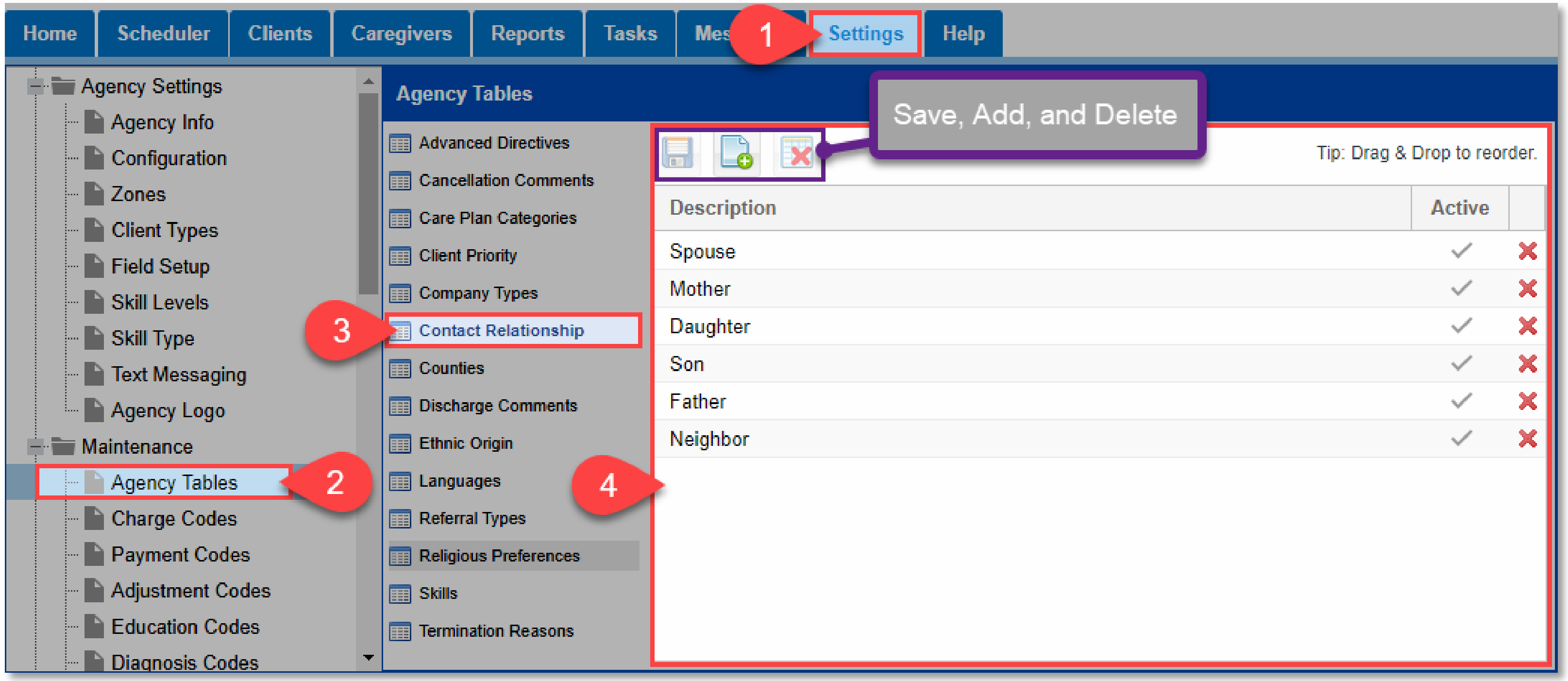
Menu Dropdowns

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.



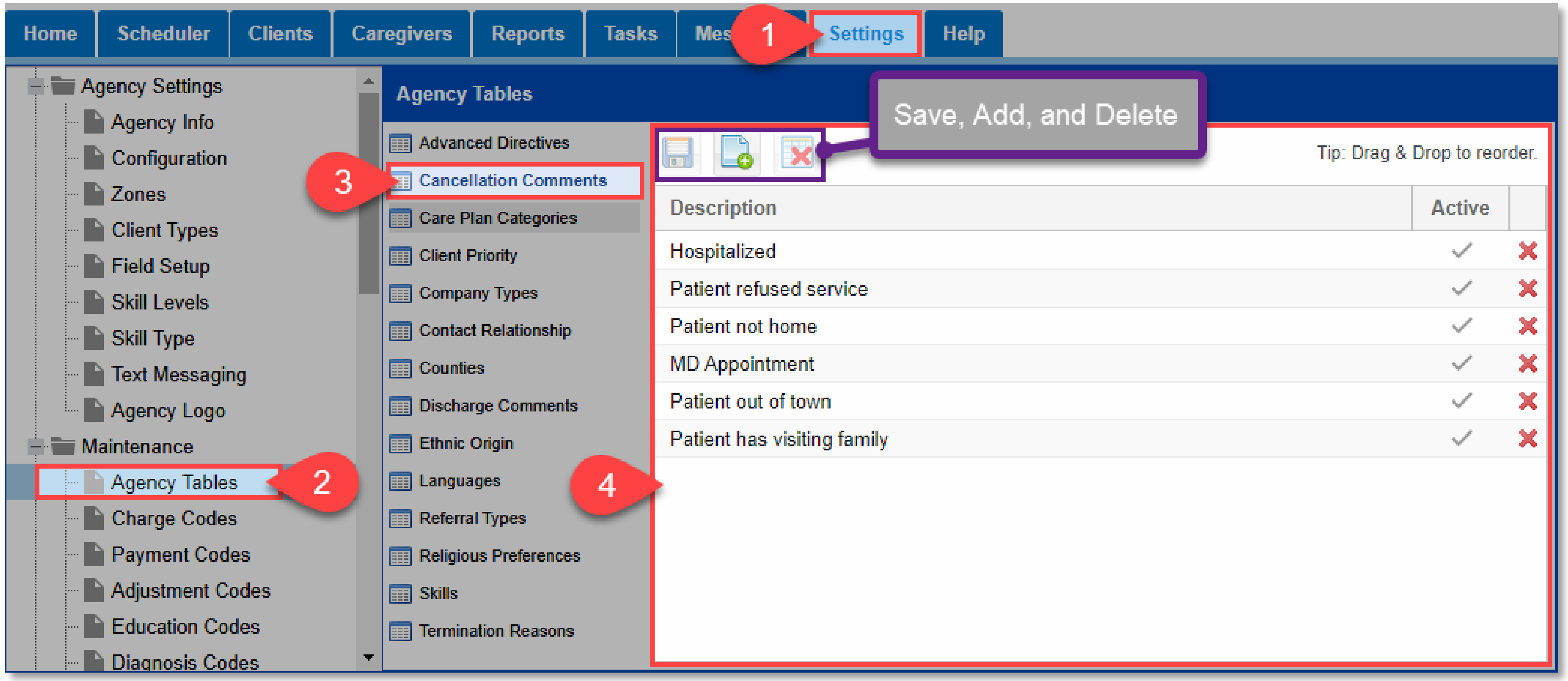
Menu Dropdowns

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.



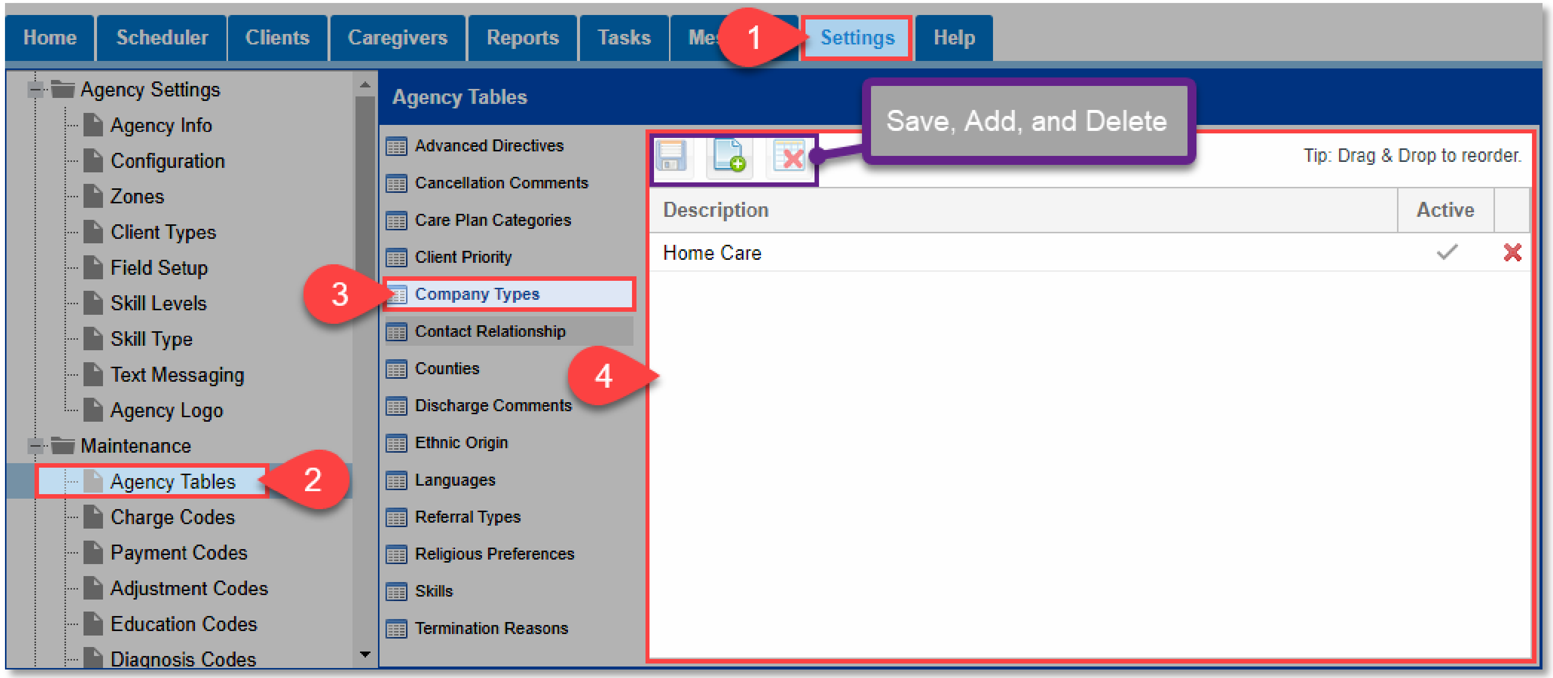
Menu Dropdowns

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…

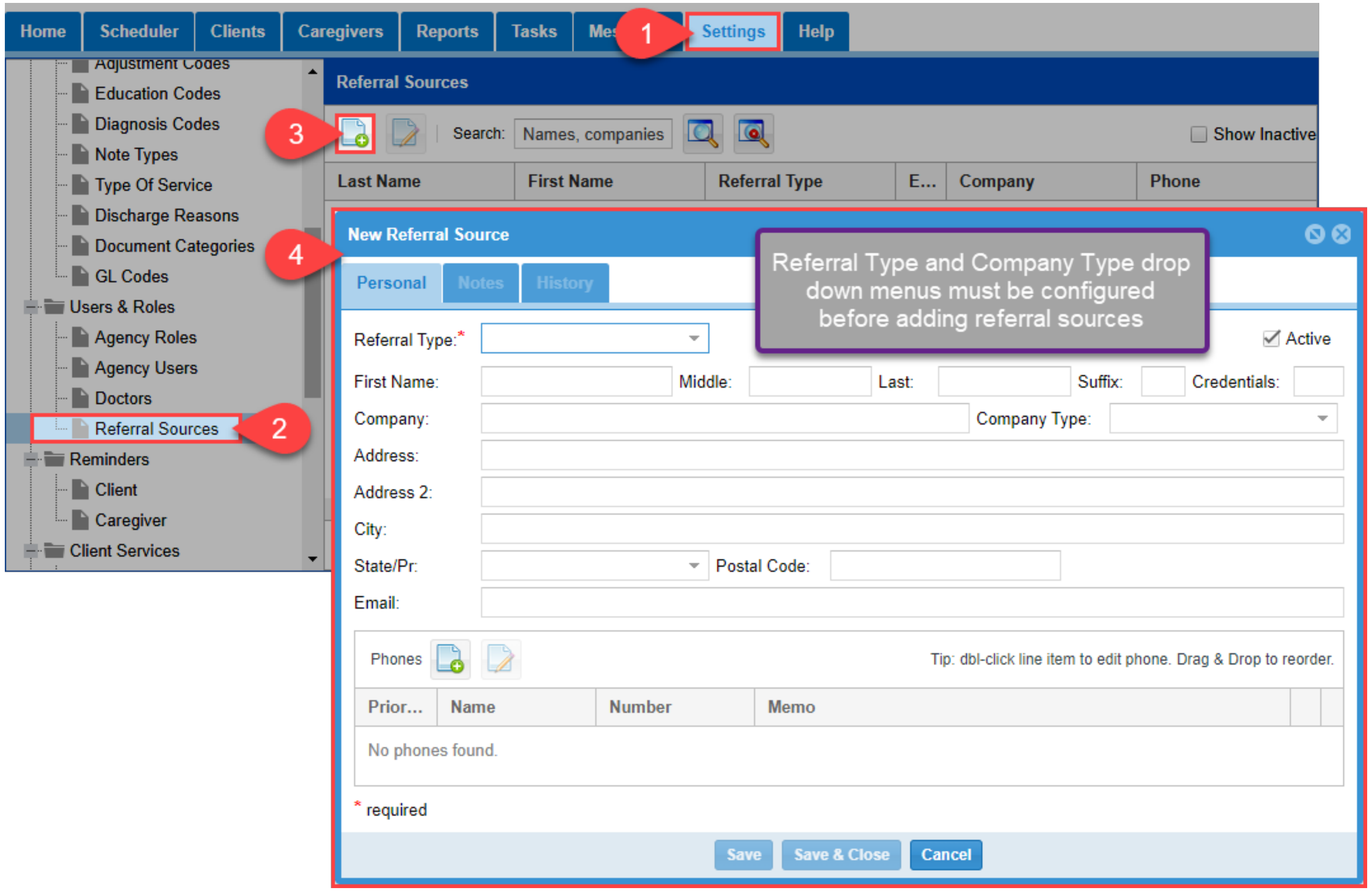
- Company Types can include hospitals, assisted living facilities, social media, or radio stations.



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.

AssuriCare

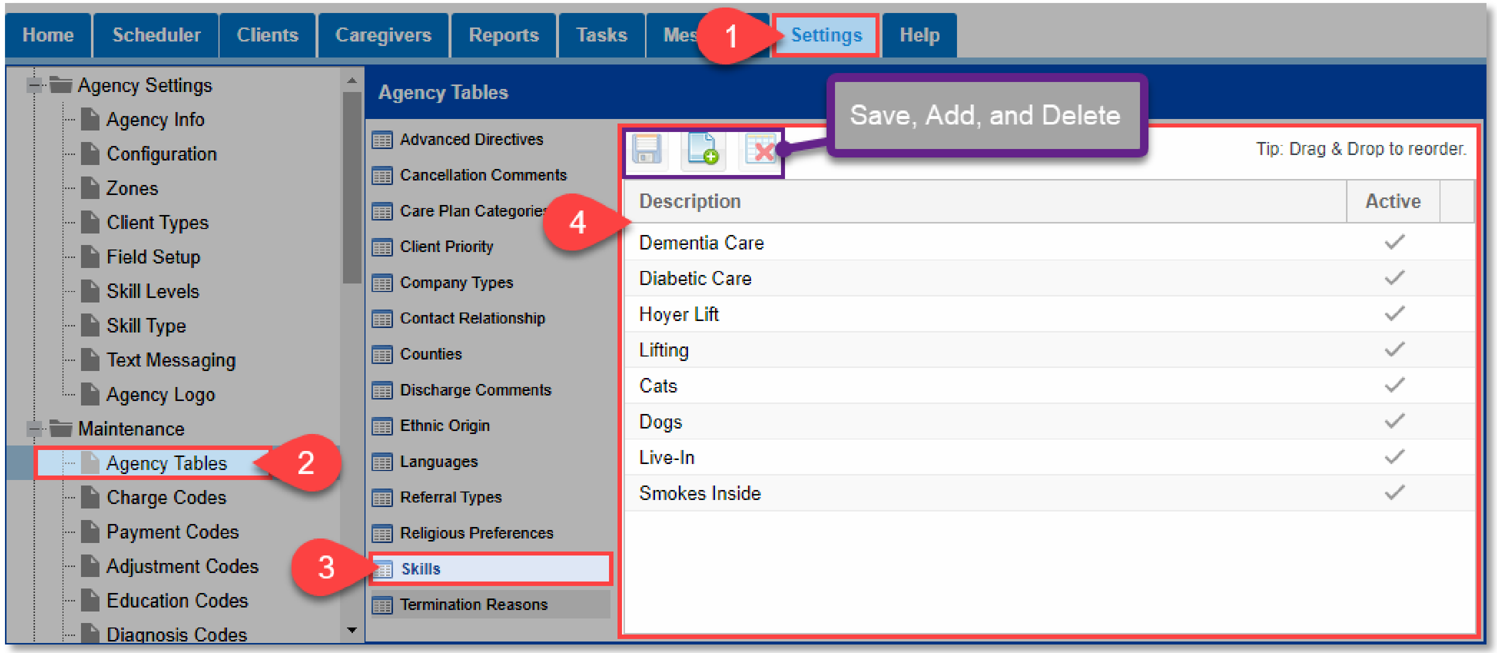
Menu Dropdowns

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.



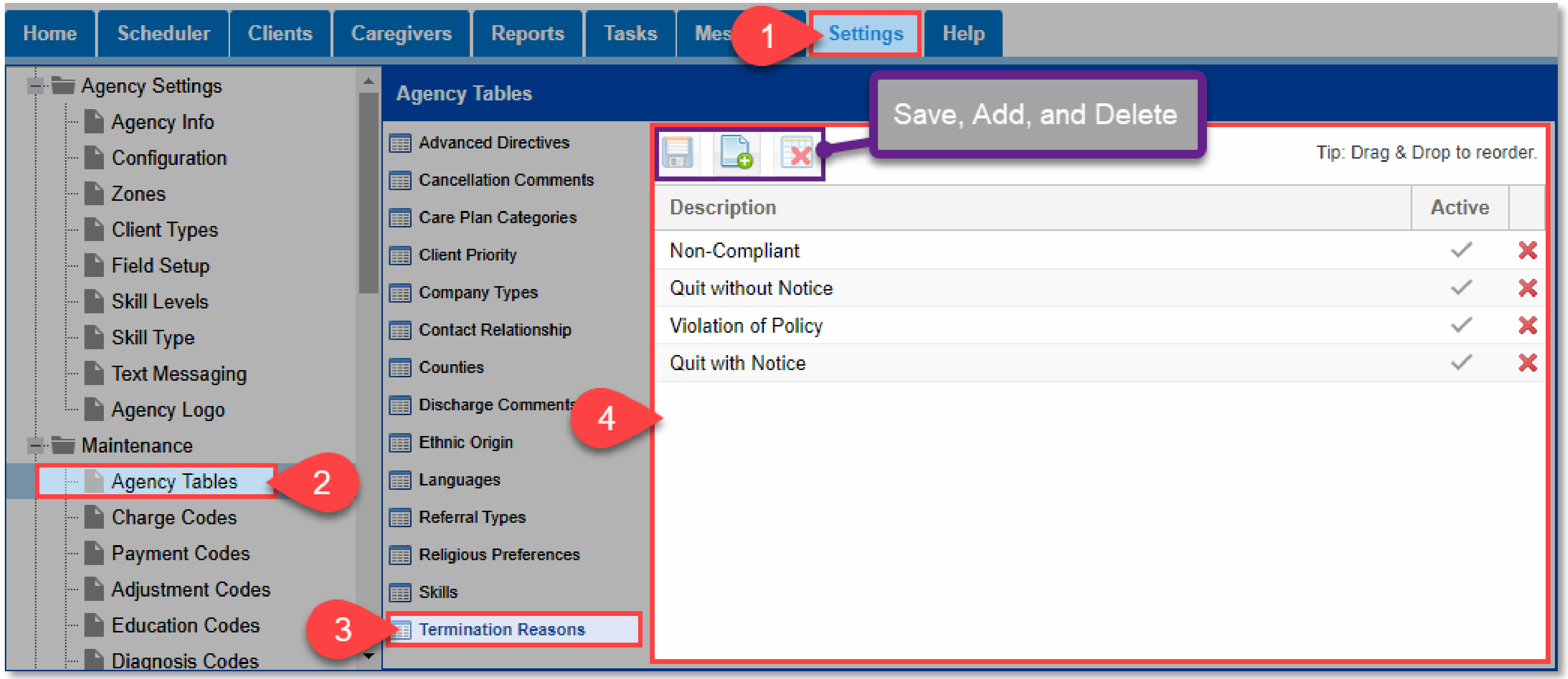
Menu Dropdowns

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…

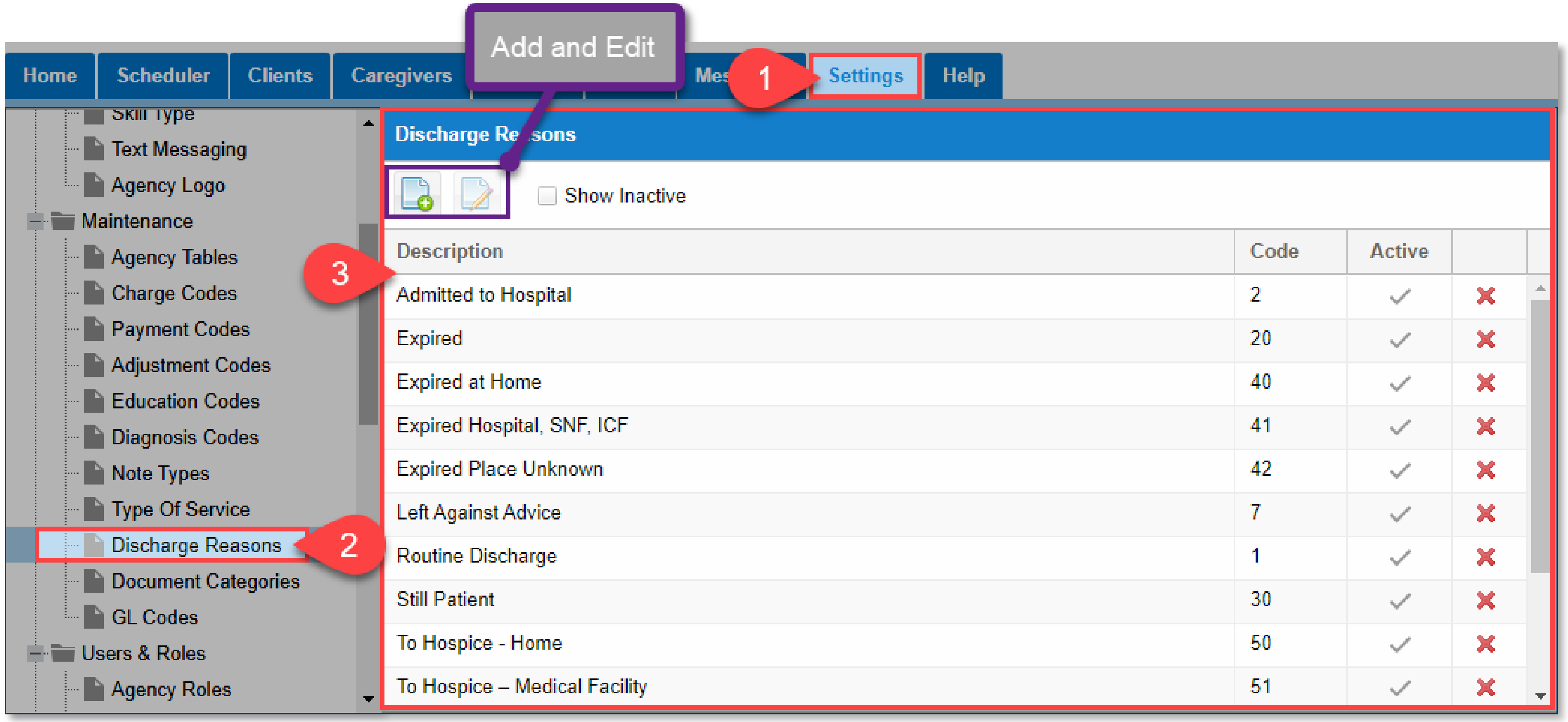
- Some examples of removal reasons include:
  - Non-Compliant
  - Quit without Notice
  - Violation of Policy
  - Quit with Notice



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.



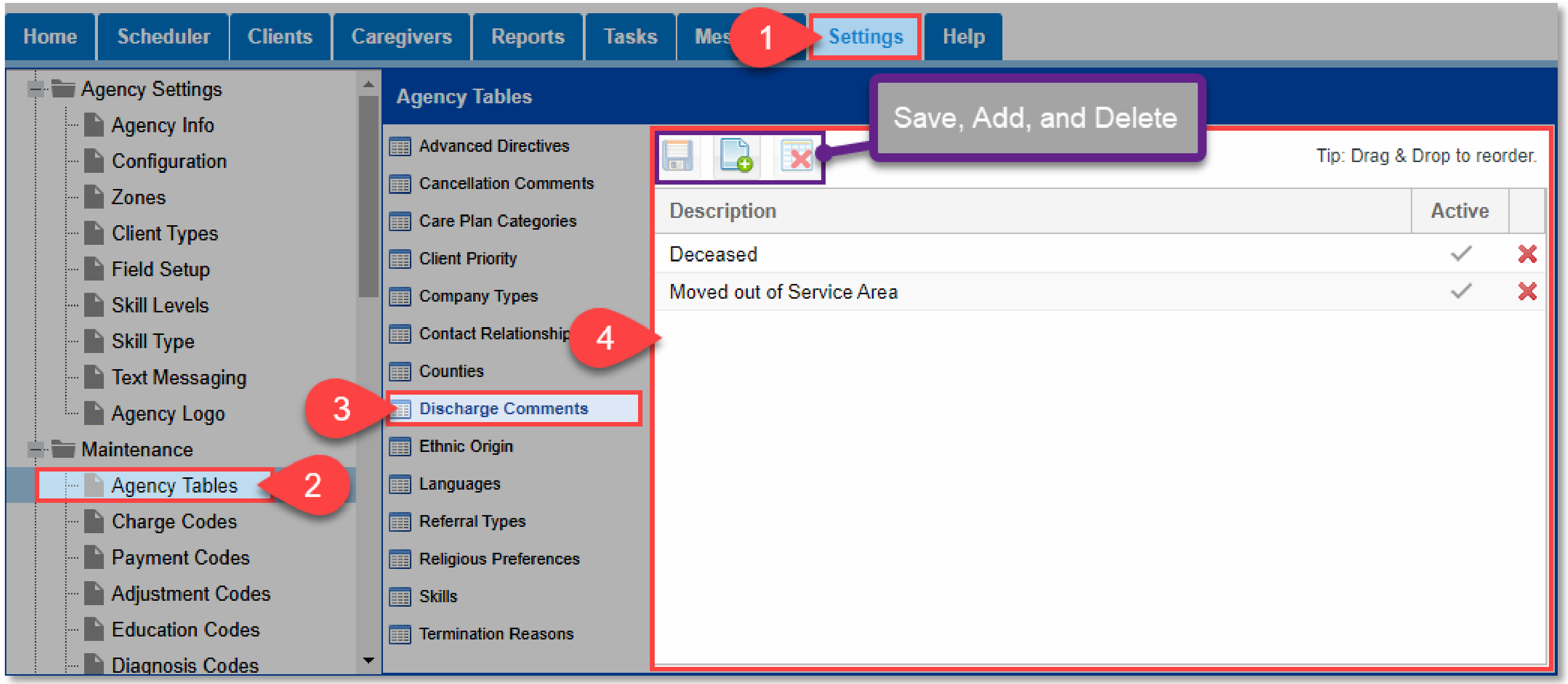
Menu Dropdowns

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.



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

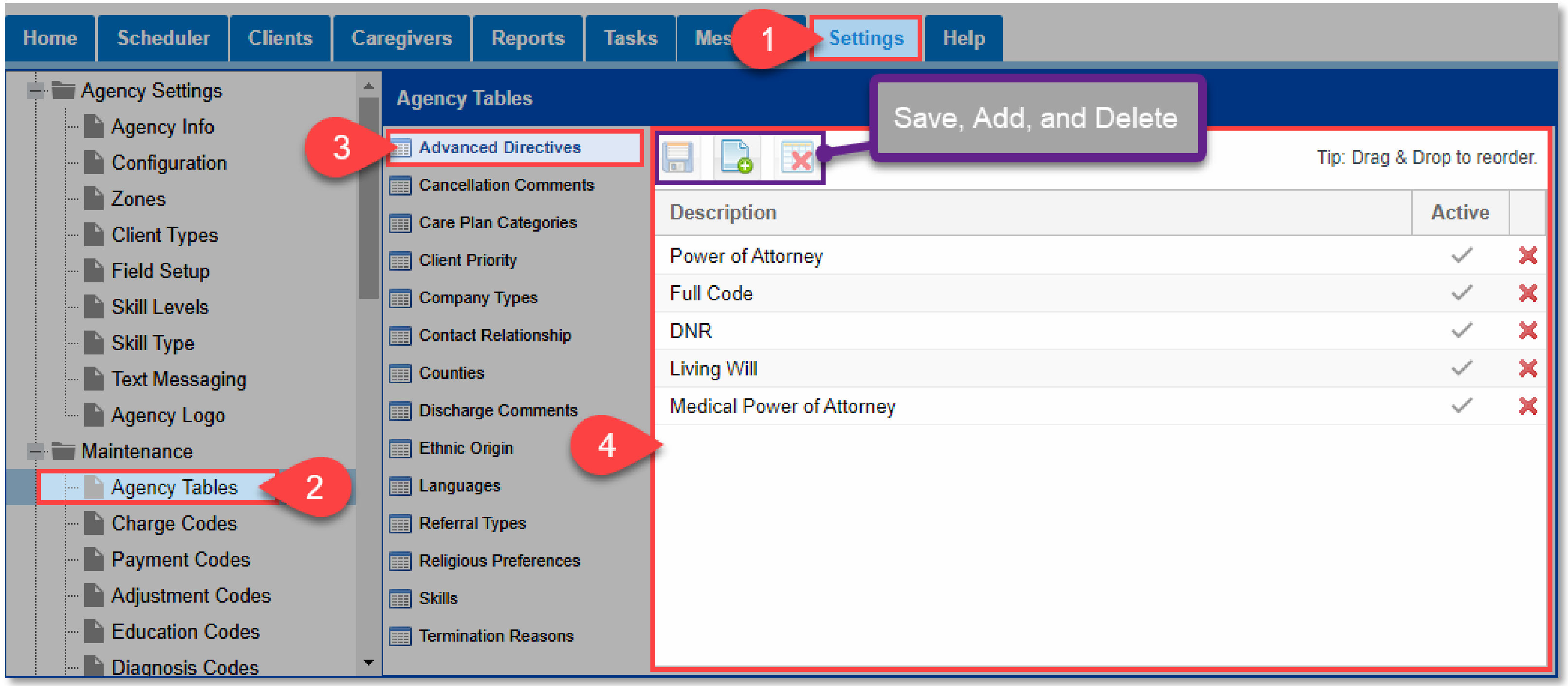
Menu Dropdowns (Optional)

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



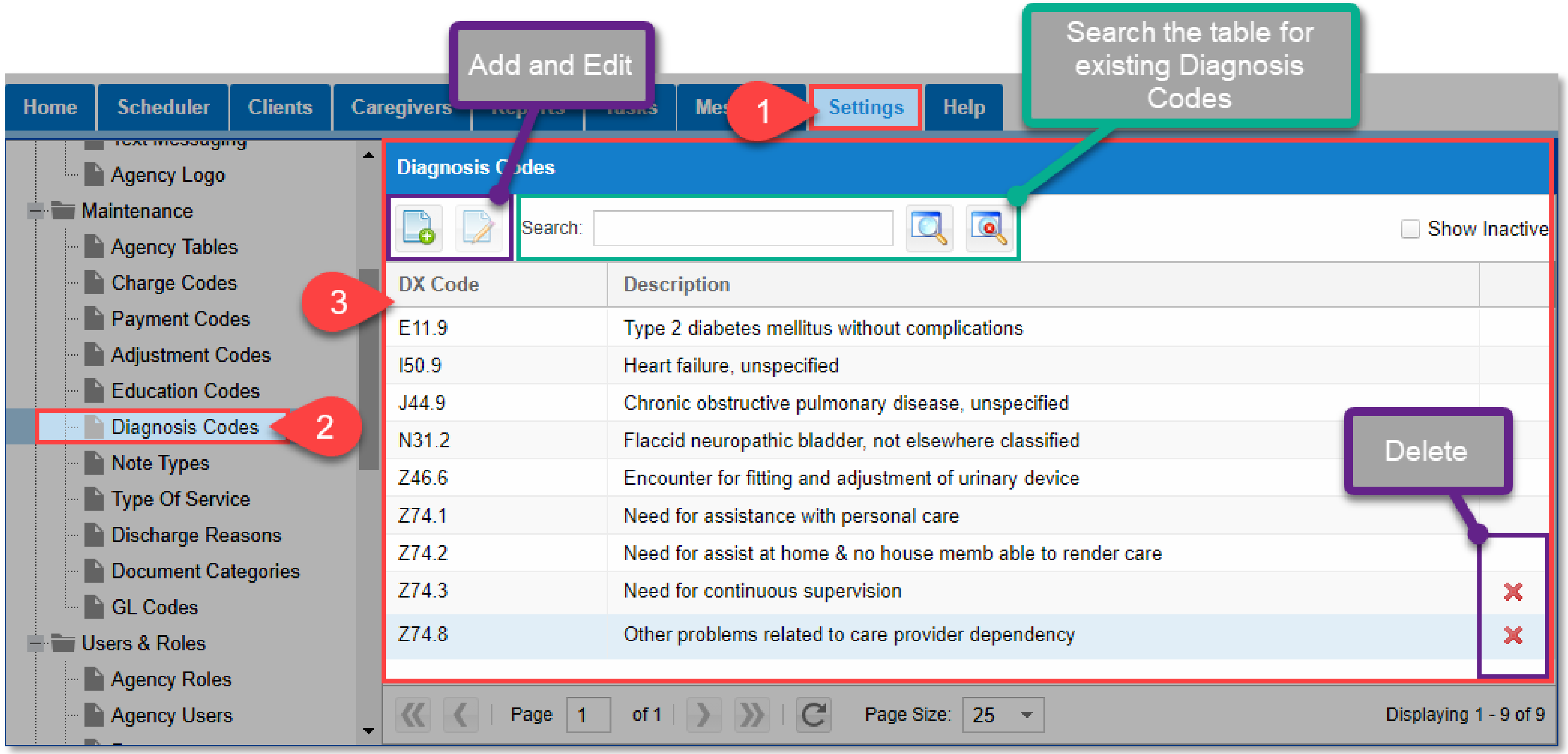
Menu Dropdowns (Optional)

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.



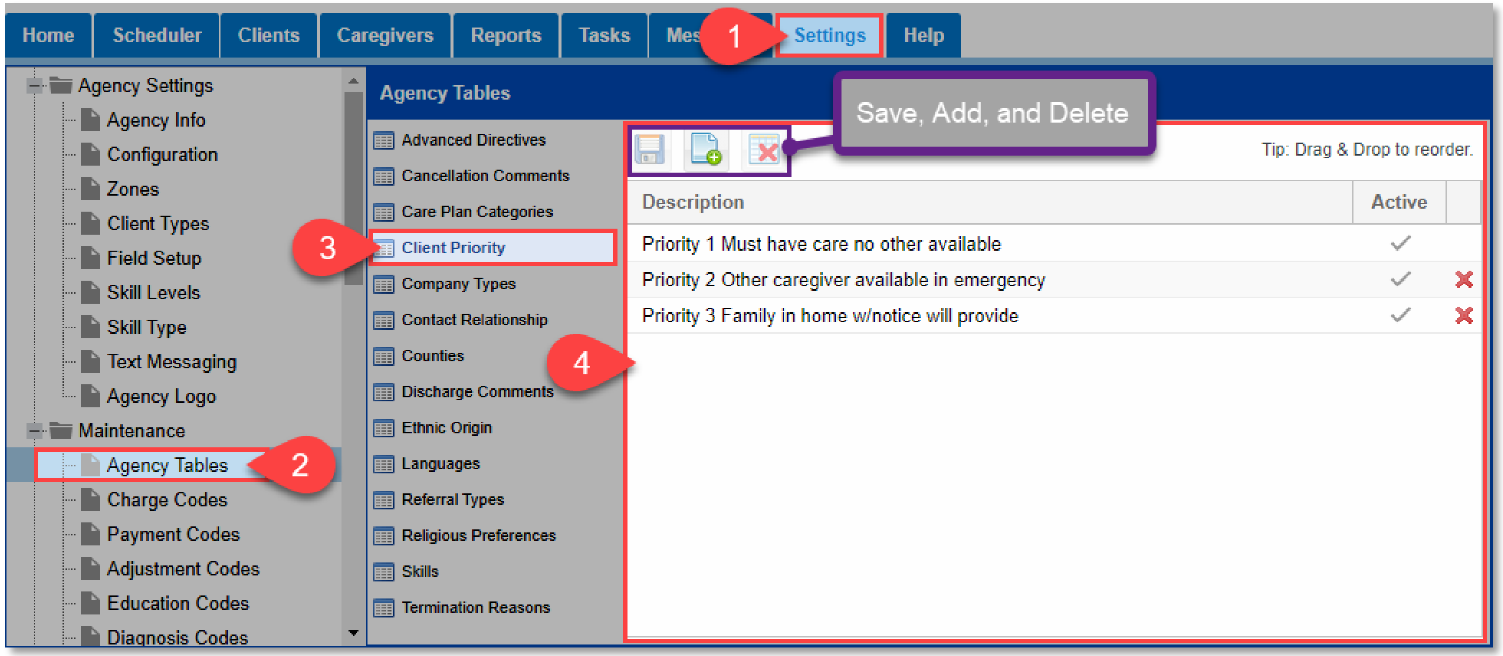
Menu Dropdowns (Optional)

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

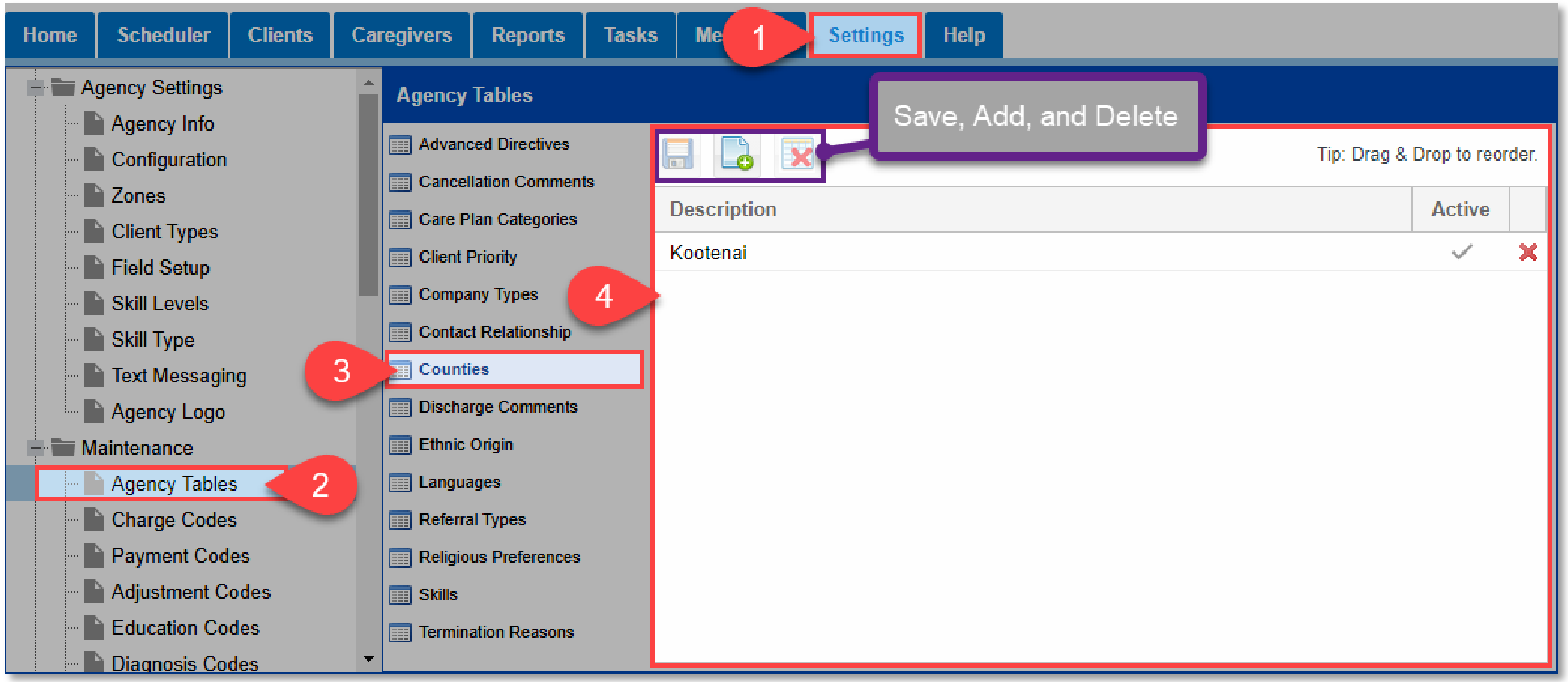
- If an Agency had a Caregiver shortage due to a natural disaster, this would inform them which clients cannot go without help.



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.

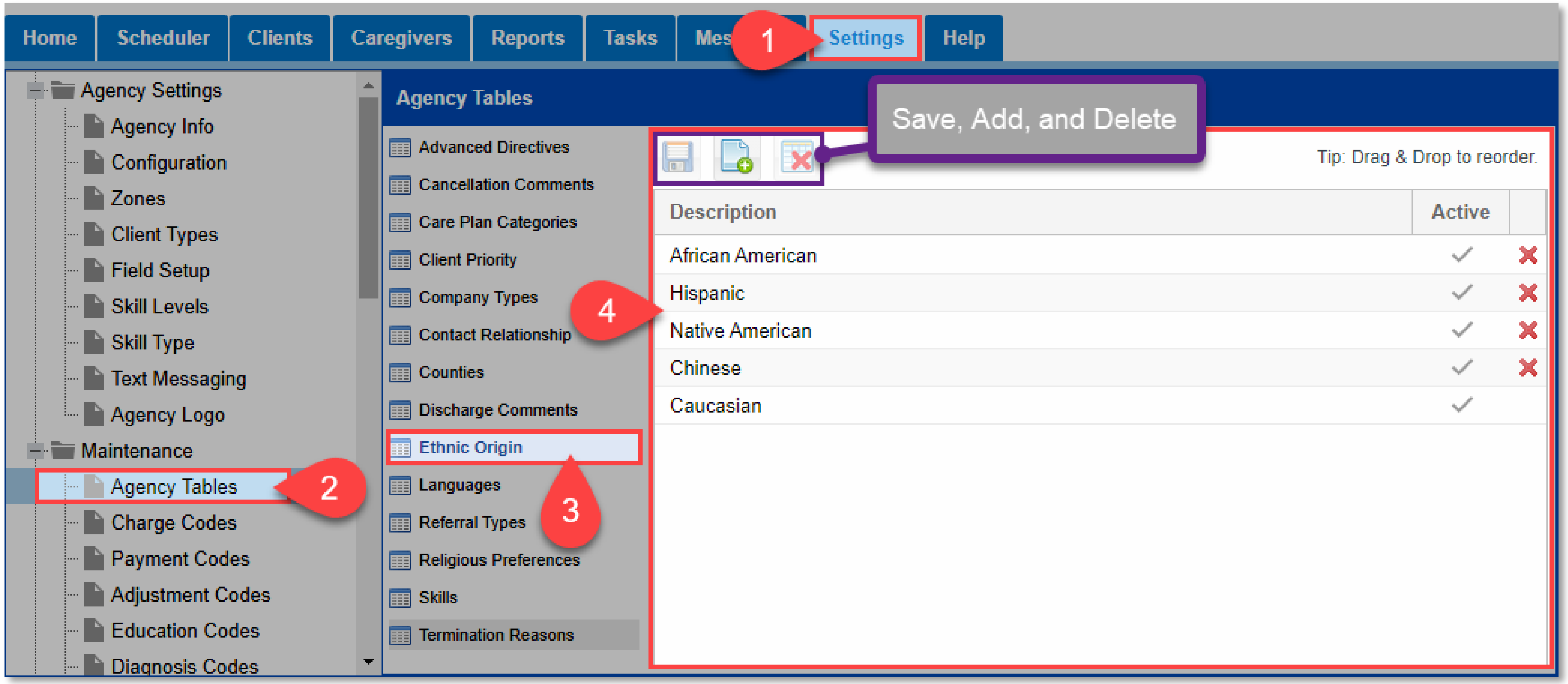


AssuriCare

Menu Dropdowns (Optional)

Agency Tables: Ethnic Origin

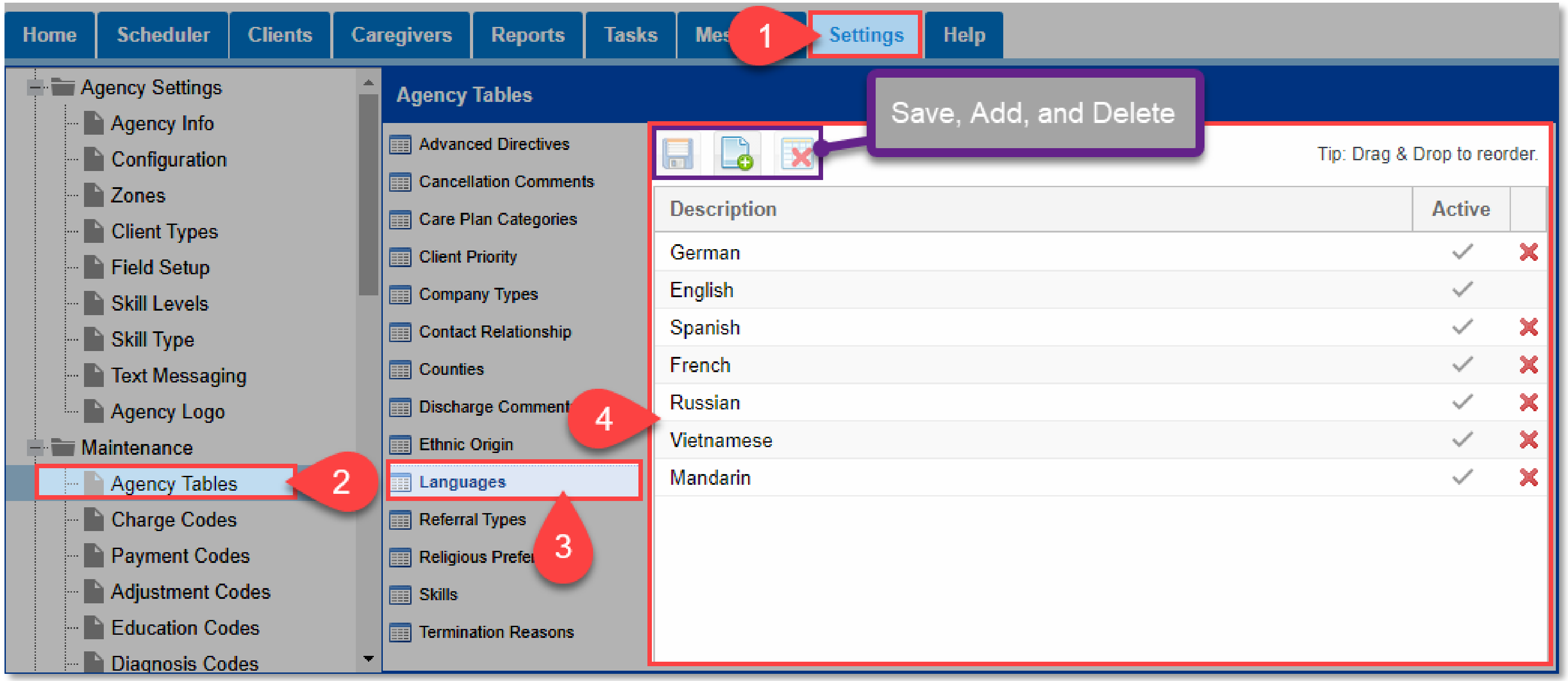
Use the Ethnic Origin tab to curate a list of available ethnicities to add to a Client or Caregiver's record.



Menu Dropdowns (Optional)

Agency Tables: Languages

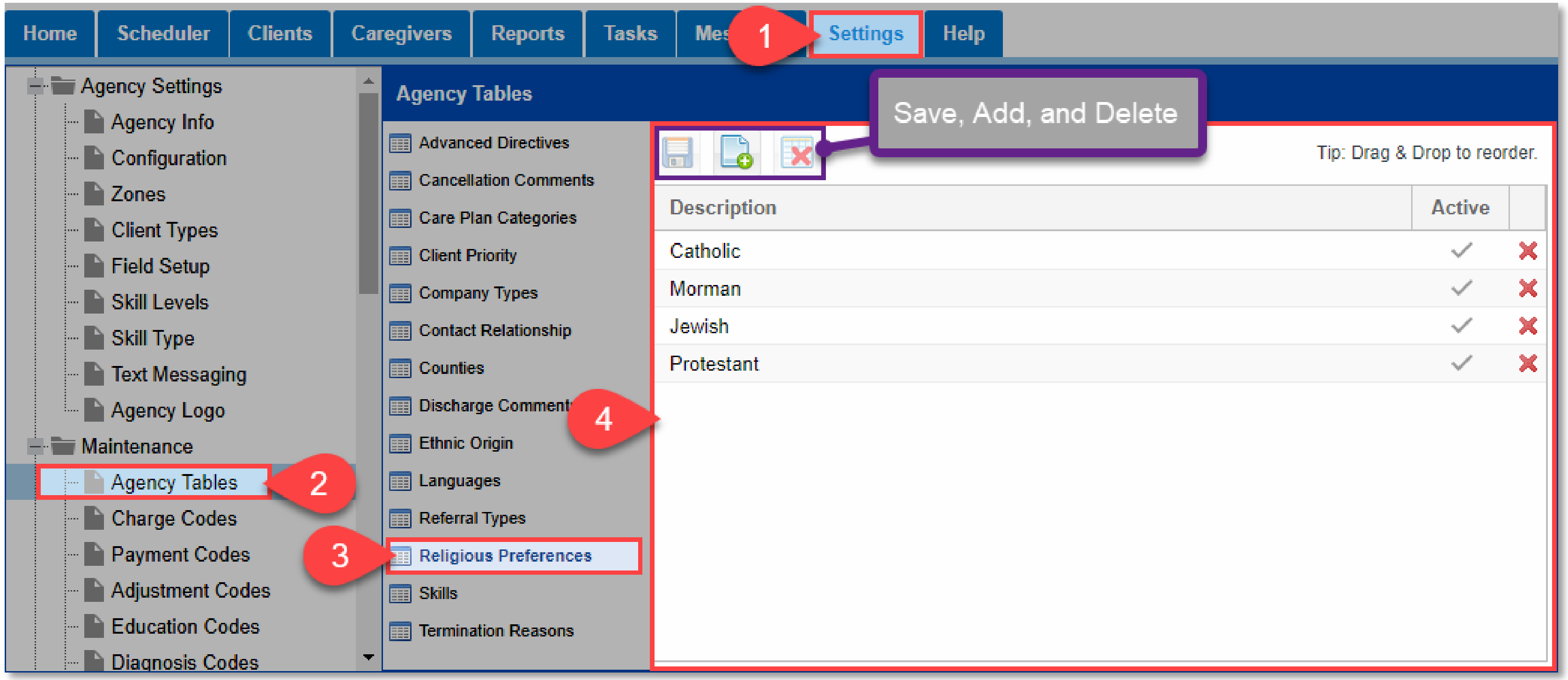
Use the Languages tab to curate a list of available languages to add to a Client or Caregiver's record.



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.



Communication Setup

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

Design document categories

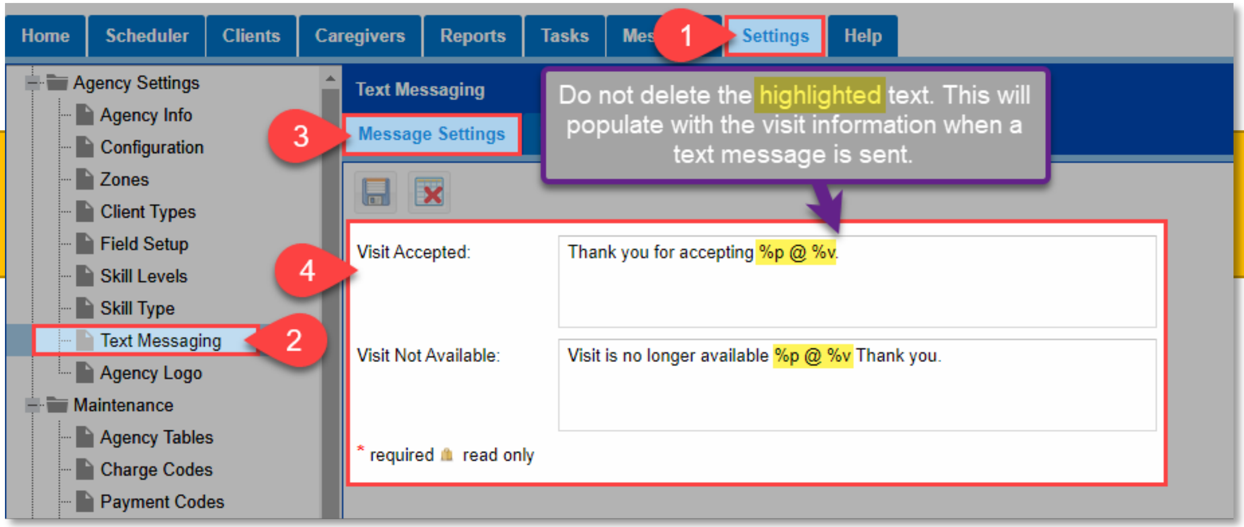
Configure note types

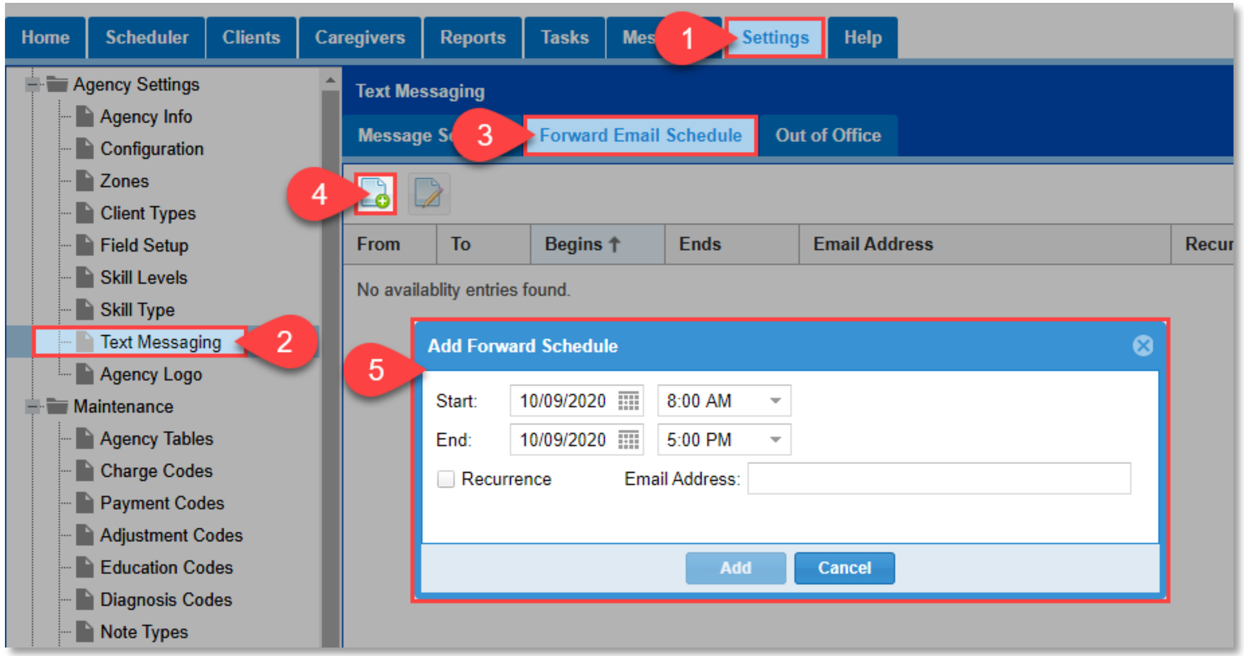
Build default text messages for available visits

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.

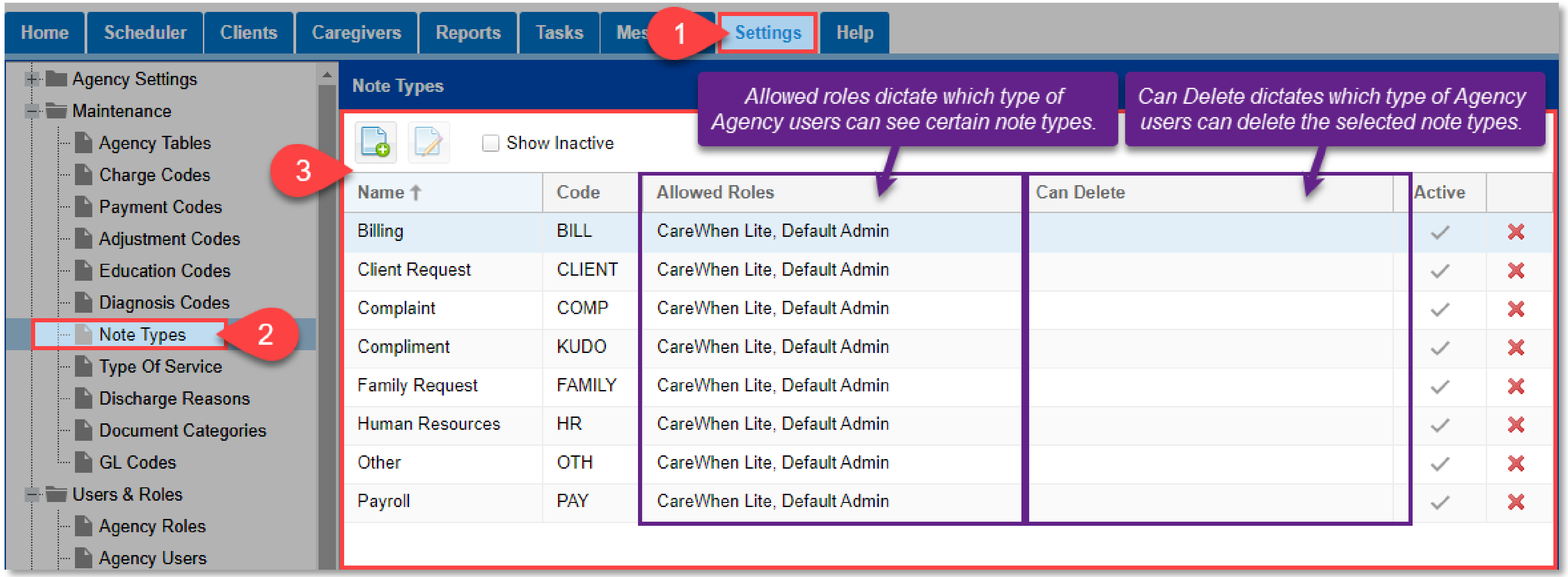
Communication Setup

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.



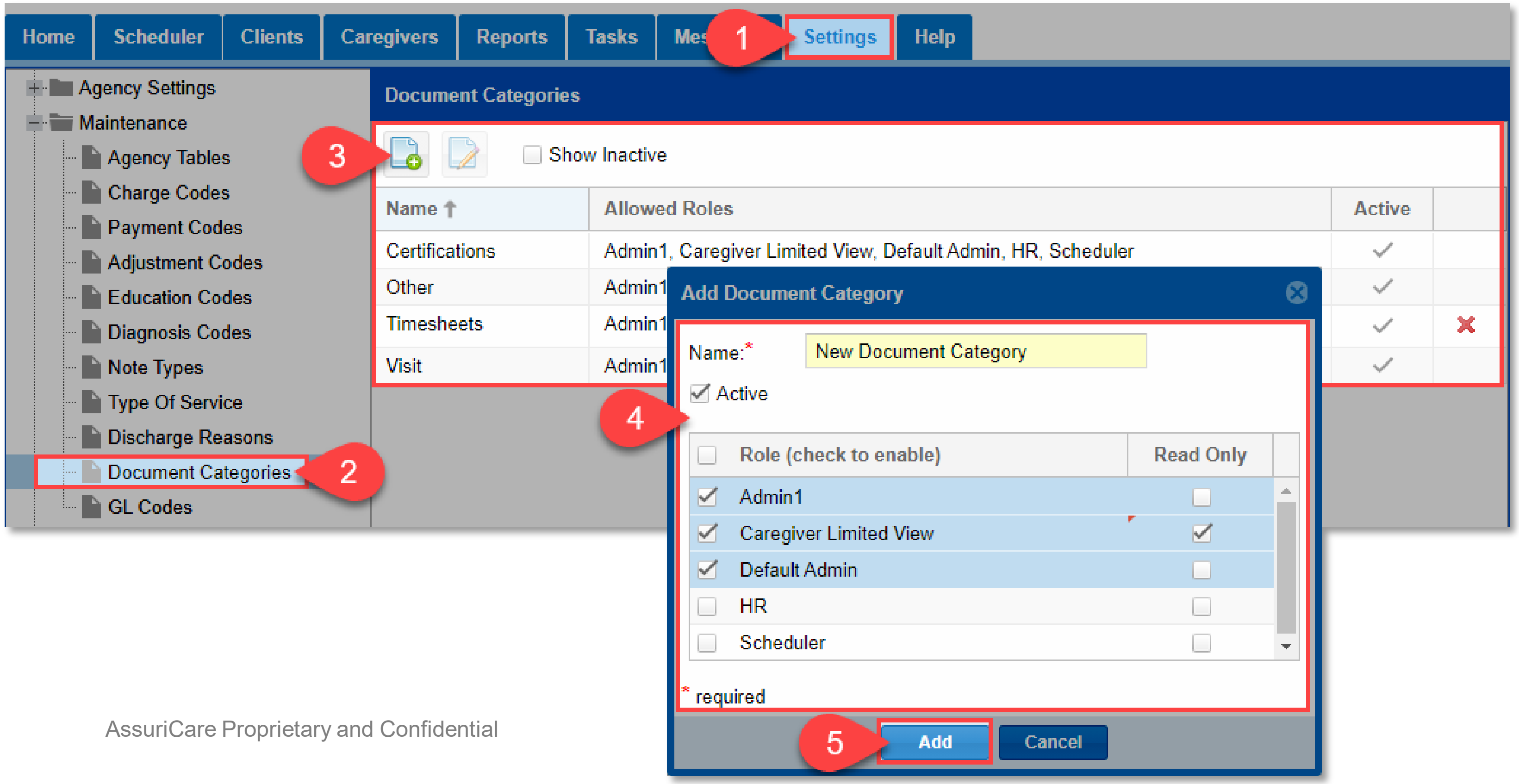
Communication Setup

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.



User Management

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

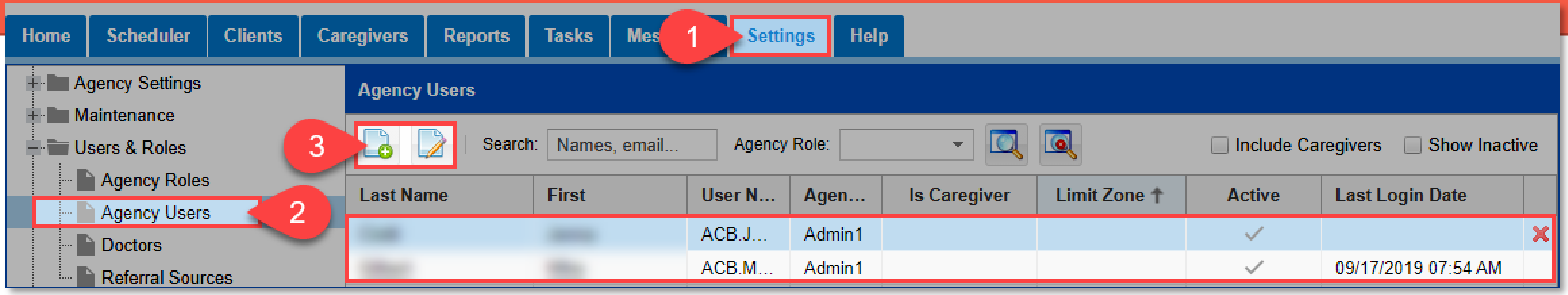
Add new users

Manage users

User Management

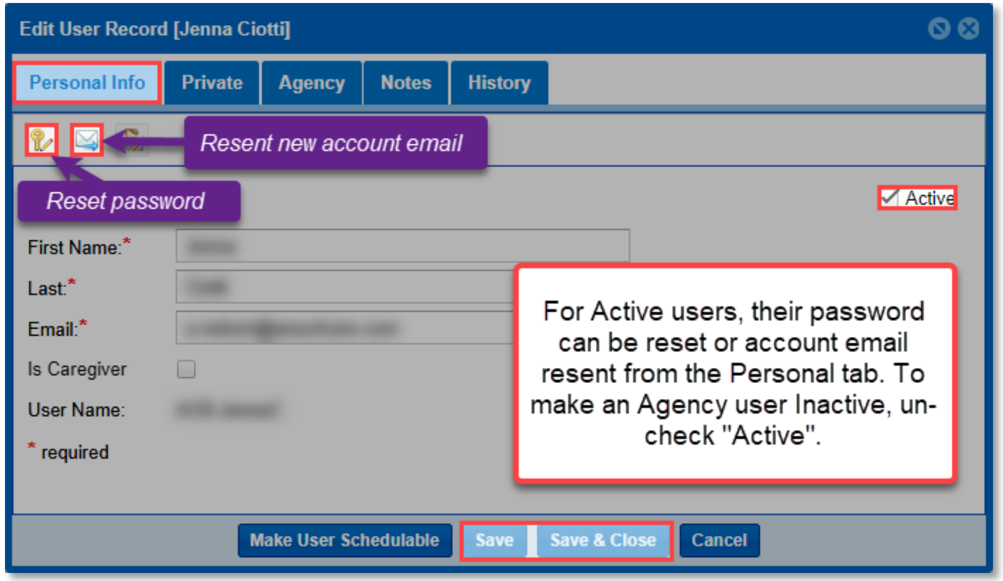
Agency Users

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



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.



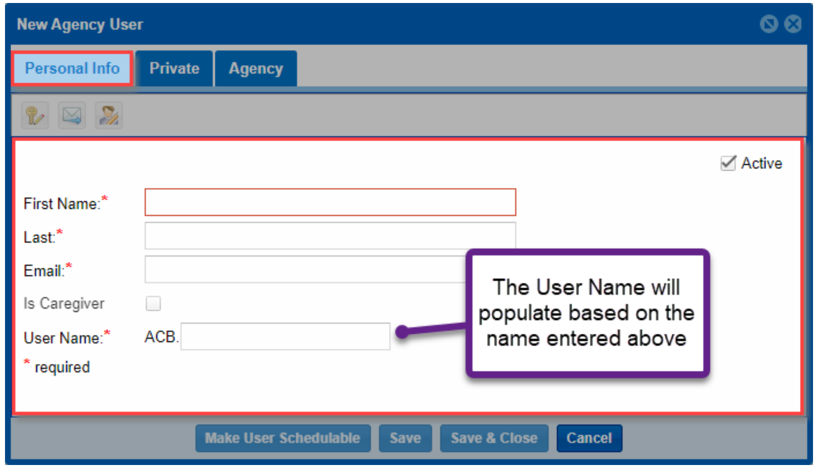
User Management

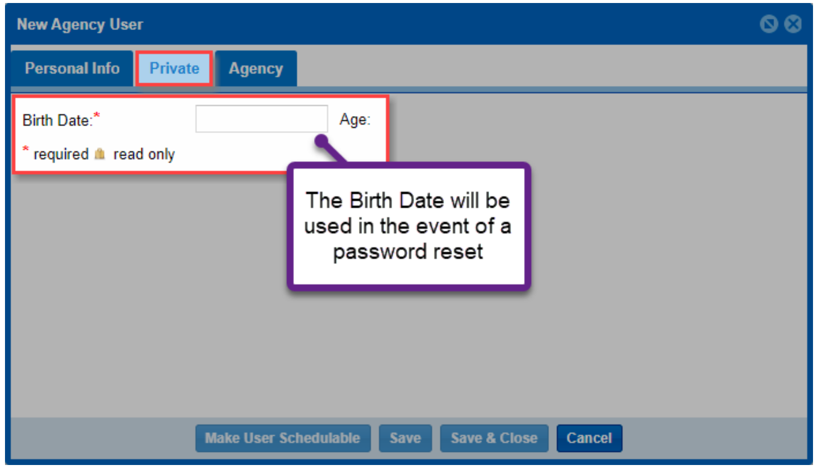
Adding a User

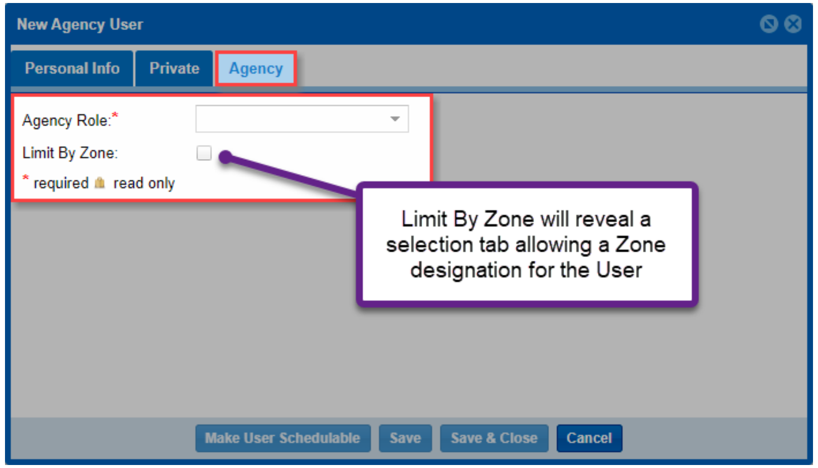
When adding a new user, information such as their name, email, username, birth date, and role are required.

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.







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

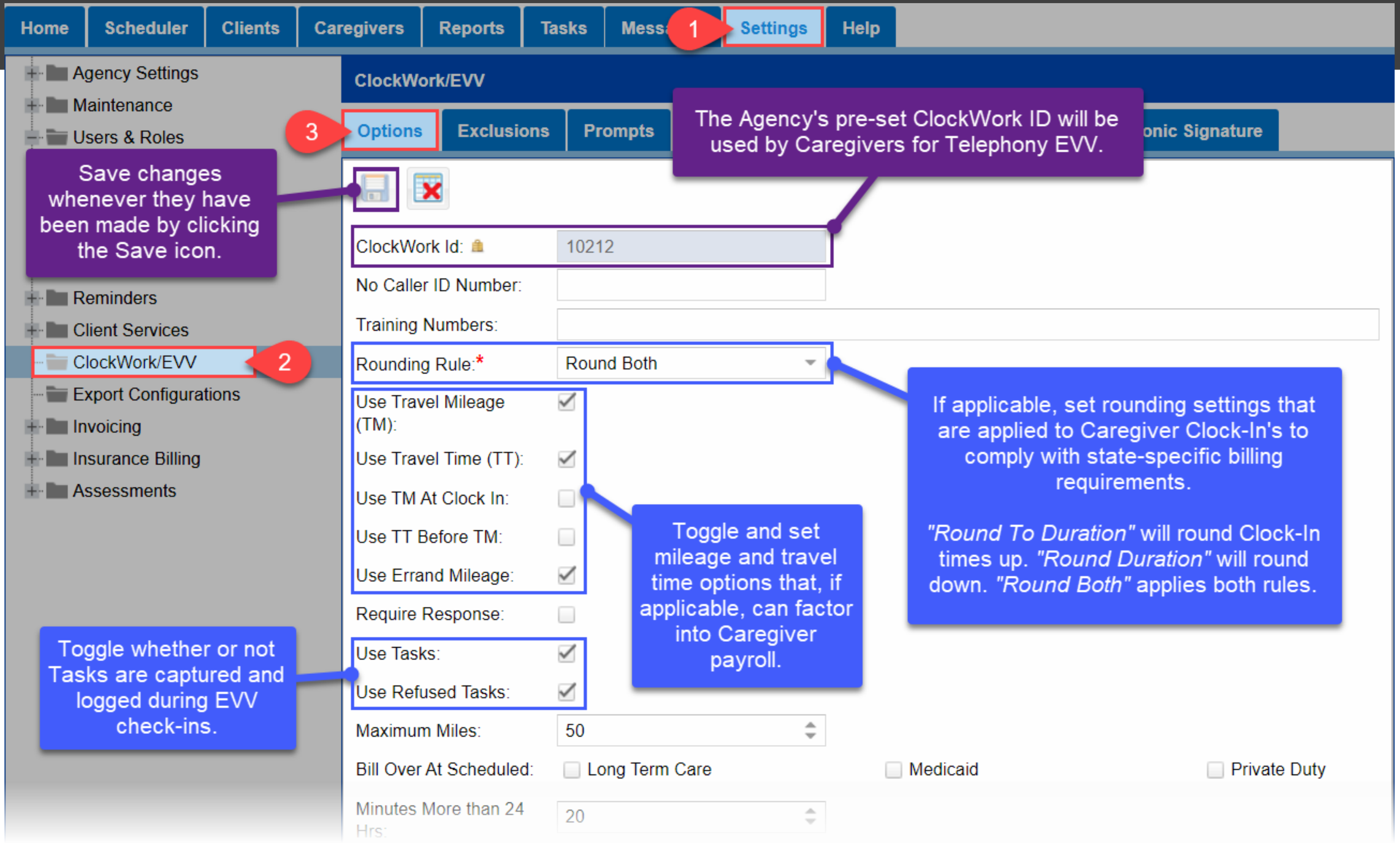
Options

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.



AssuriCare

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…

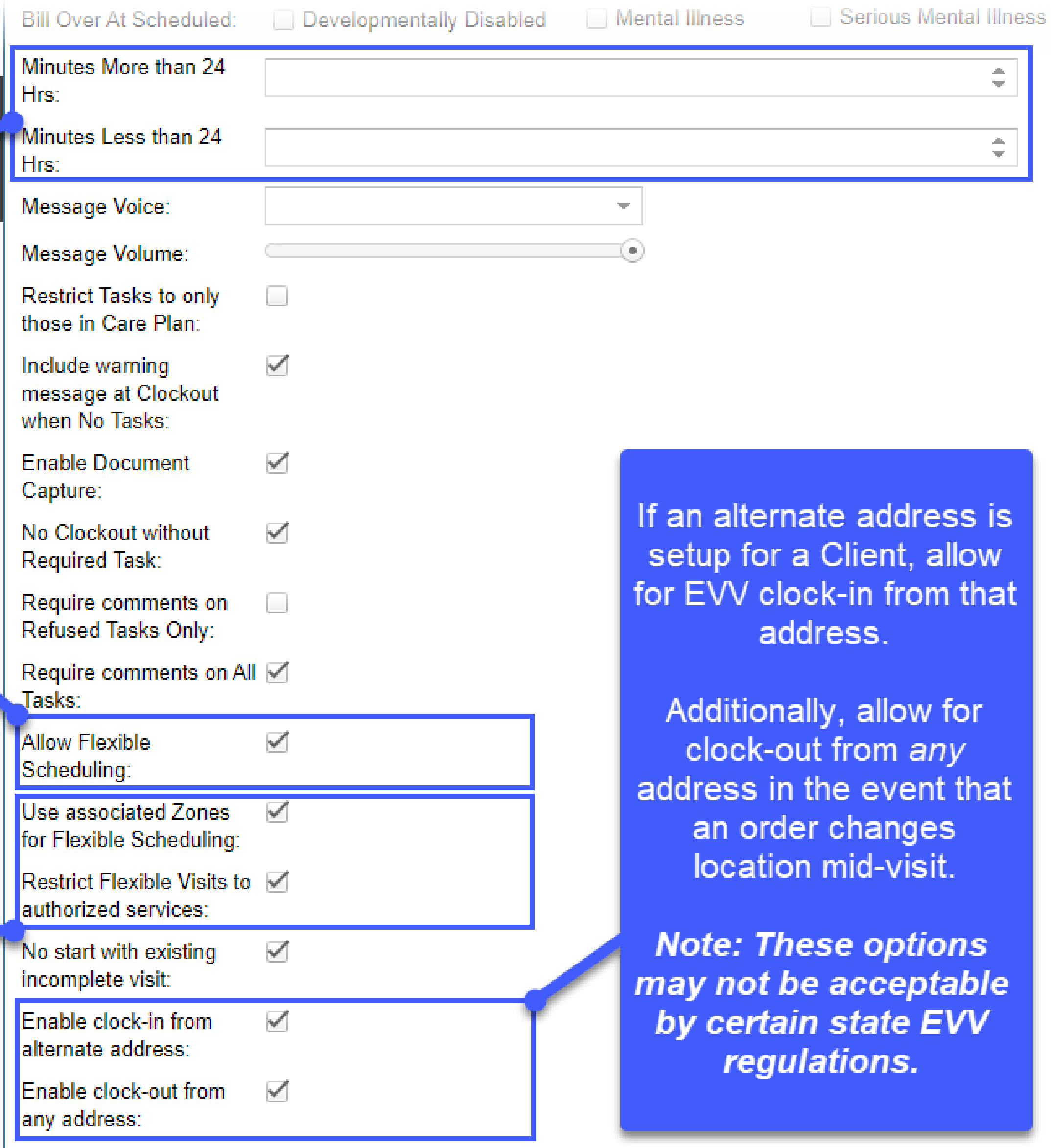
- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.

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.



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.

AssuriCare

ClockWork / EVV

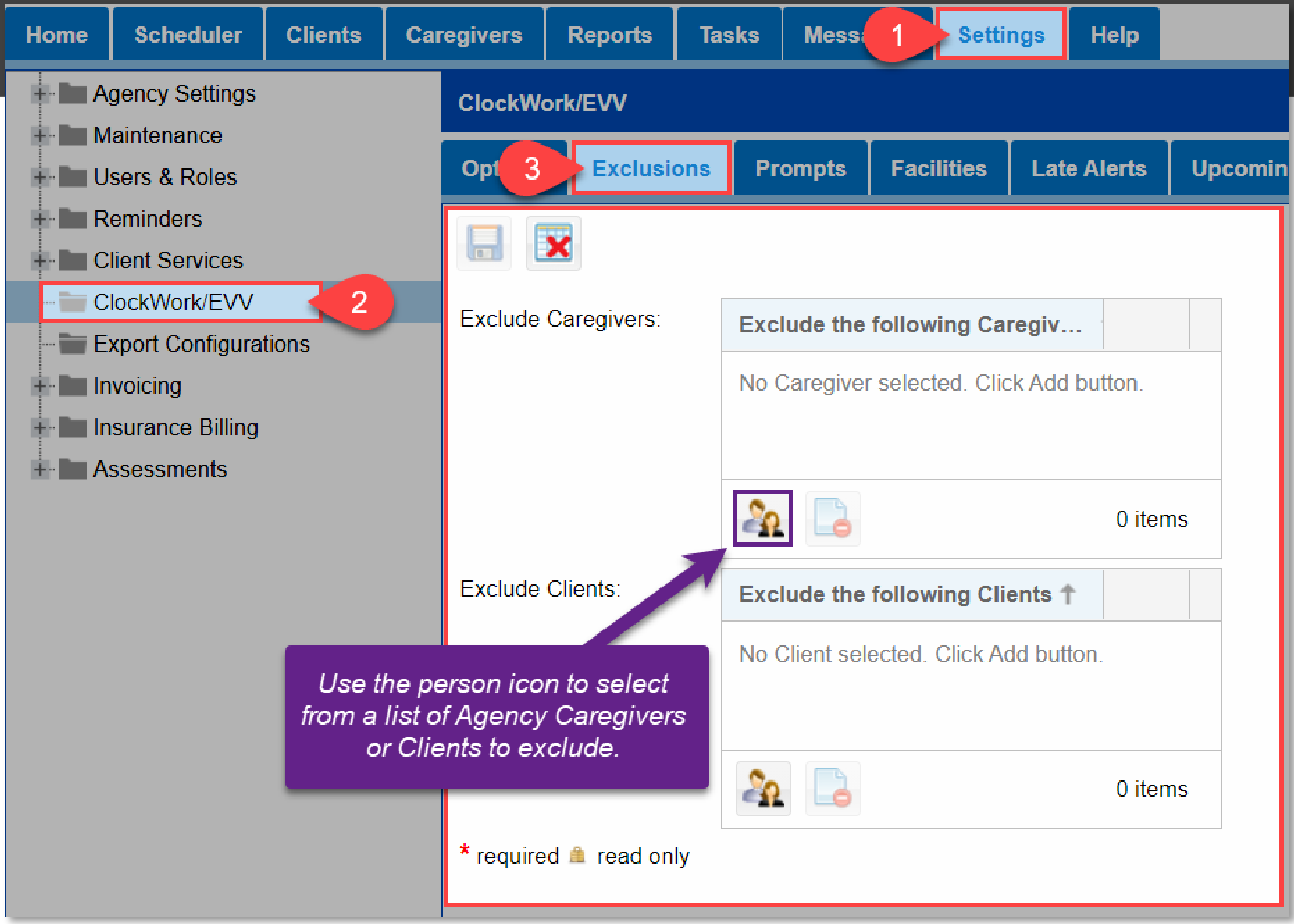
Exclusions

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”



AssuriCare

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.