



## CareWhen Lite Training

### Creating & Managing Visits



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.

# Creating & Managing Visits



CareWhen Lite scheduling functionality is limited to day-of and prior visits; scheduling future visits is available in the full version of CareWhen. The slides in this presentation will show how to create and update current or prior visits.

*To learn how to set up schedule defaults and ClockWork / EVV settings, see the CareWhen Configuration training.*

*For instructions on charge codes, see the CareWhen Foundations training.*

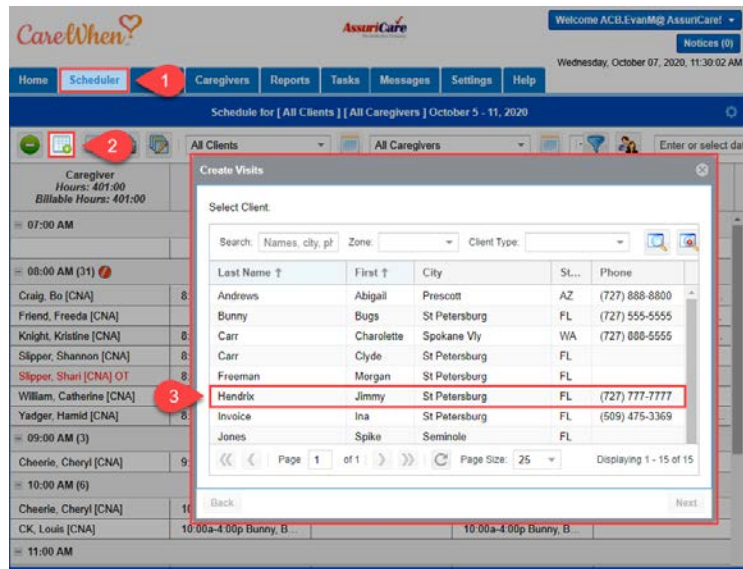


Upgrade to the full version of CareWhen to access complete scheduling functionality, including scheduling visits in the future and setting up recurring visits.

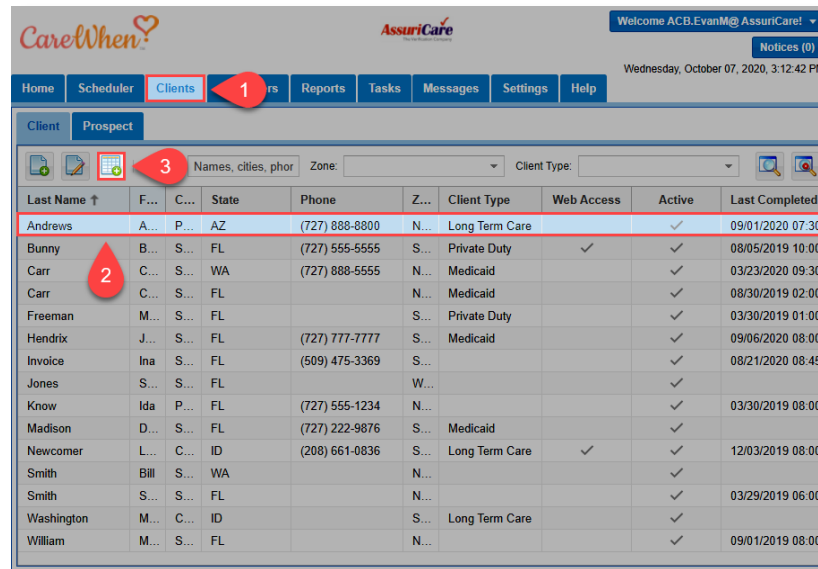
# Creating Client Visits

Client visits in CareWhen Lite can only be scheduled to the day-of or in the past. These visits can be added three different ways:

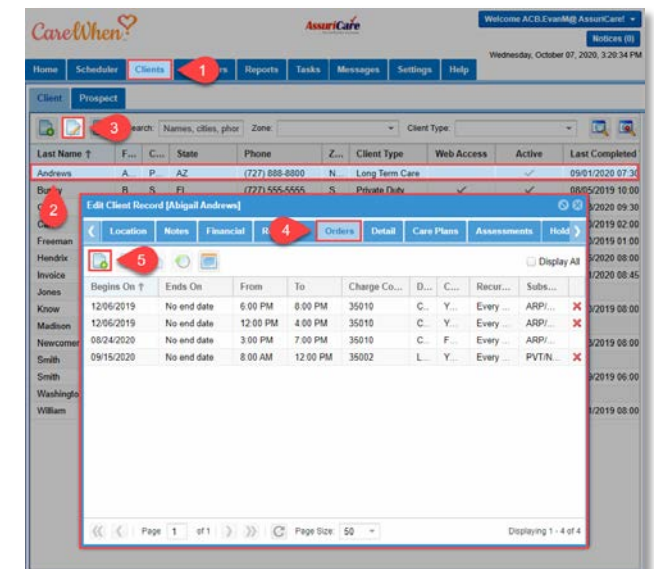
*Via the Scheduler*



*Via the Clients tab*



*Via the Orders tab in the Client Record*



# Creating Client Visits

Indicate the scheduling date type (single day or multi) and complete the date, start time, and end time fields

The screenshot shows the 'Create Visit' form with the 'Single' radio button selected. A red box labeled '1' highlights the 'Date Type' section. Another red box labeled '2' highlights the 'Start Date' field, which is open to a calendar for January 2021, with the 14th selected. A third red box labeled '3' highlights the 'Next' button. A text box at the bottom provides instructions for creating a single visit.

**Create Visit**

Date Type: ☒ Single ☐ Multi

Start Date:  Duration:  01:00 Start Time:  06:00 AM End Time:  07:00 AM

Calendar: January 2021. Selected date: 14.

Back

To create a single visit, select Single and input the start date, duration, and end time.

Click Next to continue.

The screenshot shows the 'Create Visit' form with the 'Multi' radio button selected. A red box labeled '1' highlights the 'Date Type' section. Another red box labeled '2' highlights the calendar for January 2021, with the 14th selected. A third red box labeled '3' highlights the 'Next' button. A text box at the bottom provides instructions for creating multiple visits.

**Create Visit**

Date Type: ☐ Single ☒ Multi

Duration:  01:00 Start Time:  06:00 AM End Time:  07:00 AM

Selected Dates:

Calendar: January 2021. Selected date: 14.

Back

To create a visit with multiple dates, select Multi. Click the dates on the calendar and input the start and end times.

Click Next to continue.

# Creating Client Visits



Select the appropriate charge code and then select the caregiver.

The Caregiver list that populates is based on the Skill Type required in the Charge Code.

Select the proper Subscriber, update the rates if needed, and click Finish.

Create Visit for [Andrews, Abigail] start on [3/1/2021] code [36010]

Select charge code: **36010 : Homemaker Hourly**

1 Search:   

Charge Code	Description
33010	Skilled Nursing- SN
35002	Live In Day
35010	CNA Hourly
35011	CNA PC
2 36010	Homemaker Hourly
36011	Personal Care Hourly
37010	Companion Care Hourly

The Client zone is: North

3 Assign Caregiver: Jones, Jenny (CNA)\*

Subscriber: 5 - AARP LTC, ANI - All Nations Insurance, Abigail Andrews

Lock Rates: ☐

4 Back Finish

Search for a Charge Code by description and select the desired code from the table.

Assign a Caregiver and, if applicable, select a different Subscriber (primary payor).

# Edit Client Visits

Once a visit is created, it can be edited from the Scheduler tab. Use this area to edit:

- Visit date
- Start / End time
- Assigned Charge Code
- Assigned Caregiver
- Visit Status
- Visit Comment
- If EVV events have been collected on this visit, the EVV GPS, and Electronic Signature information

The screenshot displays the AssuriCare CareWhen Scheduler interface. The top navigation bar includes 'Home', 'Scheduler' (highlighted with a red circle 1), 'Caregivers', 'Reports', 'Tasks', 'Messages', 'Settings', and 'Help'. Below the navigation bar, the main header shows 'Schedule for [ All Clients ] [ All Caregivers ] October 5 - 11, 2020'. The main content area is a calendar grid showing visits for various clients. A red circle 2 highlights a visit entry for 'Cheerie, Cheryl [CNA]' on Monday 10/5/2020 from 9:00a-10:00a. A red circle 3 highlights the 'Edit Visit' modal window.

**To edit a single visit from the Scheduler tab, double click on the visit.**

**You can change the date, time, or charge code, as well as the assigned Caregiver, visit status, or Subscriber.**

**If this is a recurring series of visits, changing the Caregiver for a single visit *will not* change the Caregiver for all visits in the series.**

**To change the Charge Code, click Show Codes and select a new one. This will change the Caregiver list for the Assign Caregiver drop down.**

**If desired, input specific comments pertaining to an individual visit.**

**Edit Visit for [Carr, Charolette] start on [Mon 10/5/2020 9:00 AM] code [36011]**

**Visit Details** | Visit History | Client On

Client: Carr, Charolette Subscriber: MPC/M...

Visit Start: 10/05/2020 Duration: 01:00 Start Time: 09:00 AM End Time: 10:00 AM

Charge Code: 36011 : Personal Care Hou... Client Zone: North

Subscriber: 3 - Medicaid PC, MDC - Medicaid, Charolette Carr

Assign Caregiver: Cheerie, Cheryl (CNA)

Visit Status: Ok

Comment: Type a short comment...

Charge Rate: Hourly: \$ 12.00

Pay Rate: Hourly: \$ 0.00

Lock Rates: ☐

Save & Close Cancel



# Edit Client Visits – Reason Codes

When manually altering completed visits, some states require the use of a Reason Code to specify the reasoning for the change. If your state requires this, the Reason Code drop down will be enabled for your Agencies version of CareWhen.

The dropdown menu will populate based on state-specific reason codes that have been hardcoded into CareWhen.

Edit Visit for [start on [Mon 10/19/2020 9:00 AM] code [35085]

Visit Details | Visit History | Client Orders | Captured Documents

Client: [redacted] Subscriber: [redacted]

Preauth Info  
Start: 08/01/2020 Stop: 12/31/2020 77.00/77.00 Hrs  
TOS: PC - Personal Care Frequency: Weekly Hours  
Preauth Notes: Preferred Schedule: 11 hours/day, F

Visit Start: 10/19/2020 Duration: 01:00 Start Time: 09:00 AM

Charge Code: 35085 : AmeriHealth Waive... Client Zone: Mount Carmel

Subscriber: [redacted]  
Assign Employee: [redacted]

Visit Status: Completed

Reason Code: [redacted]

Comment: [redacted]  
Lock Rates: ☐

If required by your state, the Reason Code drop down menu will appear and be marked as required when editing a previously completed visit.

[100] Phone number did not link to the client.  
[101] Client will not let attendant use phone.  
[102] Client does not have a phone in home.  
[103] Phone in use by client or individual in client's home.  
[104] Client received services outside of the home.  
[105] Client's phone line not working (technical issue or natural disaster).  
[106] Client requested to change/cancel scheduled visit; or the scheduled visit has been cancelled due to the client's services being suspended.  
[107] Address did not link to the client (GPS).  
[108] Attendant failed to call in.  
[109] Attendant failed to call out.  
[110] Attendant failed to call in and out.

# Create a Visit with No Assigned Caregiver



If you do not know which caregiver will be assigned to the visit, you can create a visit without assigning a caregiver by selecting “I will assign later” from the drop down.

When doing, the caregiver will need to be assigned after the order has been placed. This process is found on the next page.

To create a visit with no assigned Caregiver, select a Charge Code, **leave the Caregiver selection as "I will assign later"**, alter the Subscriber selection if needed, and click Finish.

Create Visit for [Andrews, Abigail] start on [10/9/202

Select charge code: 35010 : CNA Hourly

Search:   

Charge Code	Description	Effective Date
33010	Skilled Nursing- SN	
35002	Live In Day	
35010	CNA Hourly	
35011	CNA PC	
36010	Homemaker Hourly	
36011	Personal Care Hourly	
37010	Companion Care Hourly	

The Client zone is: North

Assign Caregiver:

Subscriber:\*

Numbered callouts: 1 points to the table, 2 points to the Assign Caregiver dropdown, 3 points to the Finish button.



# Assign Caregiver to Unassigned Visit

To assign a caregiver, double click into the unassigned visit and select the caregiver you would like to assign.

*Note: The “Unassigned” status is typically associated with future visits only available in the full version of CareWhen.*

Edit Visit for [Newcomer, Lester] start on [Sat 10/10/2020 2:30 PM] code [35010]

Visit Details | Visit History | Client Orders | Captured Documents

Client: Newcomer, Lester Subscriber: MDC/MDC

Visit Start: 10/10/2020 Duration: 05:30 Start Time: 02:30 PM End Time: 08:00 PM

Charge Code: 35010 : CNA Hourly Client Zone: South

Subscriber\*: 2 - Virginia Medicaid, MDC - Medicaid, Lester Newcomer

Assign Caregiver: I will assign later

Visit Status: Unassigned

Comment: Type a short comment...

Save & Close Cancel

To change the Charge Code of the visit, click Show Codes and select a new Charge Code. This will change the Caregivers list for the Assign Caregiver drop down.

To assign a Caregiver, either select a Caregiver from the drop down menu.

Unassigned visits show in orange

# Manage Caregiver Visit Messages

You can manage messages under the Message Alerts tab in Quick Summaries on the Scheduler.

Once you have received a response from a caregiver who would like to take the visit, you can assign directly from the messages.

Quick Summaries

Message Alerts (1)

ID	Visit Date	Start	Stop	Charge Co...	Client	Replies	Caregivers
3752	10/10/2020	02:30 PM	08:00 PM	35010	Newcomer,...	0	

To manage the messages, navigate to the Message Alerts tab under Quick Summaries found near the bottom of the Scheduler tab and double click into the message.

Message #3752 Activity for [Newcomer, Lester], Sat 10/10 02:30 PM - [35010] CNA Hourly

Date/Time	Sent To	Caregiver	Message
10/08/2020 01:10 PM	727686...	Craig, Butch [CNA]	Visit available 10/10/2020 02:30 PM to 10/10/20...

Select the Caregiver and click the person icon. Click Assign and Send to assign the Caregiver to the visit and send a confirmation text. All other messaged Caregivers will get a declined text.

Assign Visit Message for [Craig, Butch [CNA]]

Assigned To: Craig, Butch [CNA]

Message:\* Thank you for accepting [Newcomer, Lester] on Sat 10/10 02:30 PM to 08:00 PM

77 characters of max 159.

Message to declined Caregivers:\* Visit no longer available for [Newcomer, Lester] on Sat 10/10 02:30 PM to 08:00 PM

83 characters of max 159.

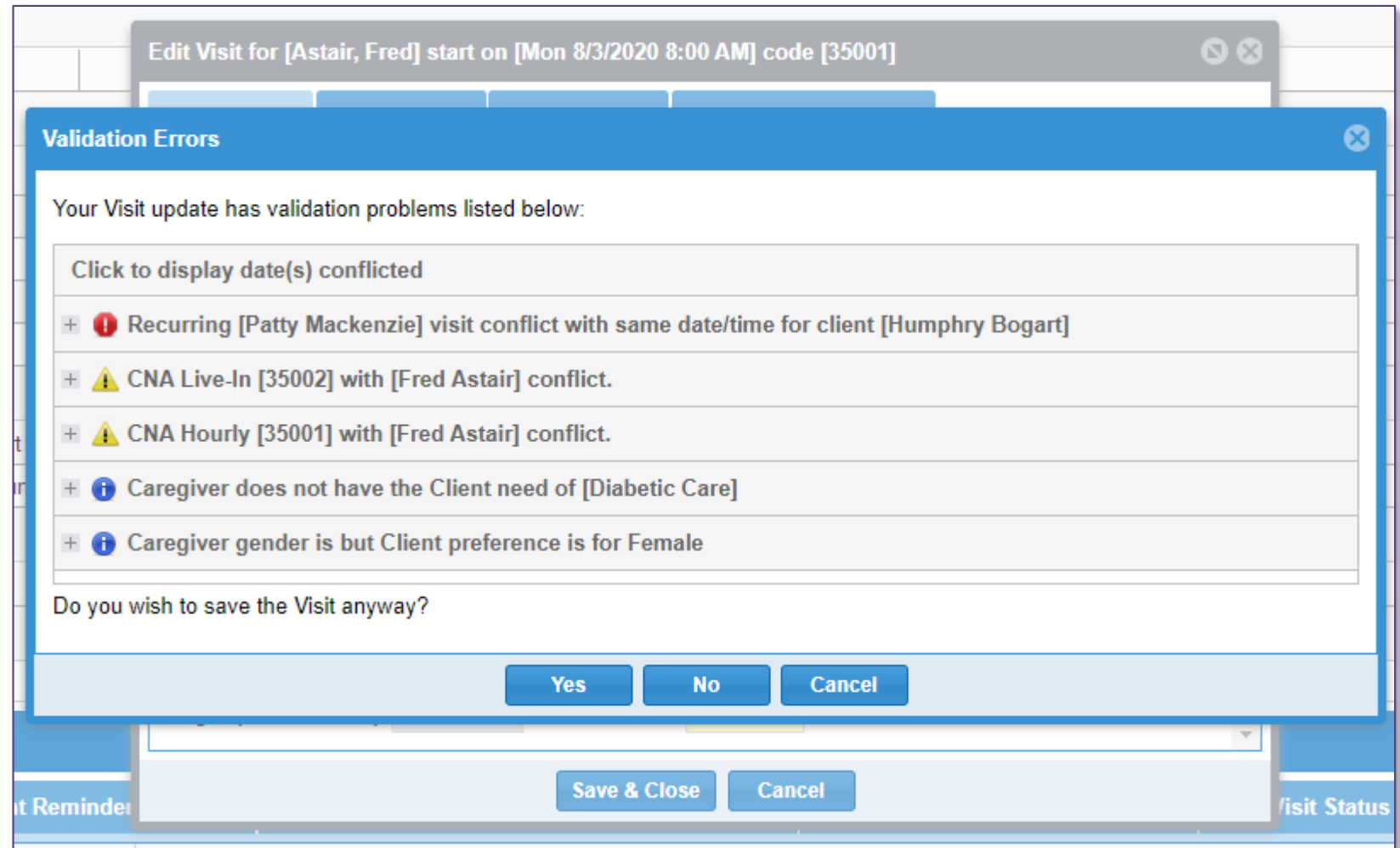
\* required

Assign and Send Cancel

# Visit Validation Errors

Whenever you save a visit, any applicable validation errors will pop up for you to either return and fix or to accept. Some validation errors include:

- Overlapping visits between different caregivers for the same client
- Multiple visits assigned to the same caregiver at that time
- Skills v. Needs mismatches
- Preference mismatches



Note: Validation Errors generally only appear when scheduling visits in the future. These may not appear within CareWhen Lite.



## Using the Scheduler Tab



The Scheduler Tab in CareWhen Lite will only allow for visits to be scheduled on the day-off, or for past visits to be added. For the ability to schedule visits in the future, upgrade to the full version of CareWhen.

# Using the Scheduler Tab

- The Scheduler will show all scheduled visits within a given week. Each visit will show in a different color depending on the visit status.

The screenshot displays the CareWhen Scheduler interface. At the top, a red-bordered box contains the text: "Visits on the Scheduler will show in different colors base on the visit status". Below this, the interface shows a navigation bar with tabs: Home, Scheduler, Clients, and Caregivers. Under the Scheduler tab, there are filters for "All Clients", "All Caregivers", and "All Zones". The main area is a calendar grid showing visits for Monday 8/3 through Friday 8/7. Visits are color-coded by status: "Unassigned" (cyan), "Completed" (orange), "Started" (yellow), and "Held" (pink). Callout boxes with arrows point to these colors: "Unassigned" points to a cyan cell, "Completed" points to an orange cell, "Started" points to a yellow cell, and "Held" points to a pink cell. There are also callouts for "Ok" and "Canceled" pointing to specific visit entries.

Caregiver Hours: 184:00 Billable Hours: 184:00	Monday 8/3 42:00 42:00	Tuesday 8/4 22:00 22:00	Wednesday 8/5 36:00 36:00	Thursday 8/6 36:00	Friday 8/7 26:00 26:00
Althof, Sue [CNA]	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James
Craig, Meg [CNA]	6:00a-10:00a Tracy, Sp...		* 6:00a-10:00a Tracy, Sp...		* 6:00a-10:00a Tracy, S...
MacEachern, Aileene [C...]	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg
Penn, Sean [CNA]		6:00a-10:00a Kennedy, John			

# Using the Scheduler Tab

- Use the Edit Visits and Complete Visits functions to alter or complete multiple visits at a time.

Edit a group of visits at once by filtering via Caregiver or Client, as well as Status and Start Date.

Check the visits you wish to edit. Select the desired mass edit, such as assigning a Caregiver to every selected visit, changing the status, or leaving a comment on each visit.

Click Apply Edits and Save.

Complete multiple visits at a time by filtering via Client, Caregiver, or Start Date.

Check the visits you wish to complete, and click Complete.



# Using the Scheduler Tab

- Use the Filter function to narrow the visits displayed in the Scheduler view
- Use the Caregiver Selector to drag and drop Caregivers onto visits
- Use the Scheduler Settings to change the display of the Scheduler tab

The screenshot shows the AssuriCare Scheduler interface. At the top, there's a navigation bar with tabs: Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings, and Help. Below this, a header indicates the schedule is for 'All Clients' and 'All Caregivers' from 'January 25 - 31, 2021'. A green callout box points to a gear icon in the top right, stating: 'View the Schedule Settings to change display options on the Scheduler.' Below the header, there are filter buttons for 'All Clients', 'All Caregivers', and 'All Zones'. A blue callout box points to the 'All Visit Statuses' dropdown menu, stating: 'Use the Filter button to sort the Scheduler tab via Skill Levels, Client Types, or Visit Status.' The dropdown menu is open, showing options like 'All Visit Statuses', 'Ok', 'Unassigned', 'Cancelled by Scheduler', 'Cancelled by Client', 'Cancelled by Caregiver', 'Cancelled by Other', 'Held', 'Started', 'Completed', 'Conflict', 'Caregiver Not Available', and 'Unavailable Override'. To the right, a 'Schedule Settings' dialog box is open, showing options for 'Status Float' (None), 'Display Mode' (Caregiver), and 'Group By' (Hourly). Below this, a 'Caregiver Selector - Drag & Drop to Schedule' dialog box is open, displaying a list of caregivers with columns for Name, City, State, and Phone. A red callout box points to this dialog, stating: 'Quickly assign Caregivers to visits by using the Caregiver Selector tool. Locate the desired Caregiver from the list, then drag and drop them to the visit you wish to assign them to.' The main scheduler grid shows visits for Monday 1/25, Wednesday 1/27, and Thursday 1/28. A 'Quick Summaries' section is visible at the bottom left.

# Using the Scheduler Tab

- Make use of the Client Monthly View to see a Client's scheduled visits on a monthly-basis
- Use this view to quickly identify whether or not a Client is within, or has exceeded, their Insurance Preauth amount

The screenshot shows the AssuriCare Scheduler Tab interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings, and Help. The main header displays "Schedule for [ Andrews, Abigail ] [ All Caregivers ] January 25 - 31, 2021". Below this, there are filters for the client name (Andrews, Abigail), caregivers (All Caregivers), and zones (All Zones). A red box highlights the client name dropdown. A red arrow points from the client name dropdown to a red callout box that reads: "Use the Client Monthly View to display a day-by-day breakdown of all visits associated with that client, as well as their Insurance Preauth status, if applicable." The interface shows a grid of dates from Monday 1/25 to Saturday 1/30, with a list of visits for each day.

The screenshot shows the AssuriCare Scheduler Tab interface in the Weekly View. The header displays "Client : Andrews, Abigail : January 2021". Below this, there are filters for the client name (Andrews, Abigail) and caregivers (All Caregivers). A purple callout box reads: "Use the Weekly View button to return to the standard Scheduler view." The interface shows a grid of dates from Tuesday 1/26 to Saturday 1/30, with a list of visits for each day. The visits are categorized by "Daily Hours" and "Weekly Hours".

# Scheduler Tab Quick Summaries

The bottom of the scheduler tab houses the Quick Summaries area. This area is made up of tabs containing useful information such as a Daily Summary, Messages and Alerts, Visit Status, and EVV Exceptions (EVV visits containing an issue such as a mismatched phone number).

Cheerie, Cheryl [CNA]	9:00a-10:00a Carr, Cha...		9:00a-10:00a Carr, Cha...		9:00a-10:00a Carr, Cha...		
10:00 AM (6)							
Cheerie, Cheryl [CNA]	10:00a-11:30a Carr, Ch...		10:00a-11:30a Carr, Ch...		10:00a-11:30a Carr, Ch...		
CK, Louis [CNA]	10:00a-4:00p Bunny, B...		10:00a-4:00p Bunny, B...		10:00a-4:00p Bunny, B...		
11:00 AM							
Quick Summaries							
Daily Summary	Message Alerts (0)	Caregiver Reminder Alerts (0)	Client Reminder Alerts (0)	Unassigned & Caregiver Not Available Visits (3)	Clients with Overlapping Visits (12)	EVV Visit Status	EVV Exceptions (0)
Day	Date	Visits	Unassigned	Completed	Hours		
Monday	10/19/2020	14	0	0	79.00		
Tuesday	10/20/2020	8	0	0	44.00		
Wednesday	10/21/2020	14	0	0	79.00		
Thursday	10/22/2020	8	0	0	44.00		
Friday	10/23/2020	14	0	0	79.00		
Saturday	10/24/2020	6	1	0	38.00		
Sunday	10/25/2020	6	1	0	38.00		
	Totals :	70	2	0	401.00		



# Appendix

# A Note about “Skills”

Agencies also have the option to use *Skills*, which are set up within the Agency Tables. These *Skills* are used to list specific abilities that caregivers may have. These skills will also show up on client records as *Needs*. Agencies can use this information to further aid in ensuring that properly skilled caregivers are scheduled.

The screenshot shows the 'Settings' tab in the AssuriCare interface. The 'Agency Tables' section is expanded, and the 'Skills' table is visible. A red box highlights the 'Add' button (a plus icon) with a red circle and the number 4. A red box highlights the 'Skills' table with a red circle and the number 5. A red box highlights the 'Check Mark' button (a checkmark icon) with a red circle and the number 3. A red box highlights the 'Agency Tables' menu item with a red circle and the number 2. A red box highlights the 'Settings' tab with a red circle and the number 1. A red box highlights the 'Add' button (a plus icon) with a red circle and the number 4. A red box highlights the 'Skills' table with a red circle and the number 5.

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

Add skills by clicking the Add button and typing the skill name in the new line. Click the Check Mark to save the Skill when complete.

The screenshot shows the 'Edit Caregiver Record' for Annie Apple. The 'Scheduling' tab is selected. The 'Zone' is set to North. The 'Desired Hours Per Week' is 30. The 'Skills' section shows a grid of checkboxes for various skills. A red box highlights the 'Skills' section.

Skills:	Check All	Cats	Dementia Care
✓ Diabetic Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Lifting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the 'Edit Client Record' for Abigail Andrews. The 'Scheduling' tab is selected. The 'Zone' is set to North. The 'Primary Caregiver' is Glynn, Derek. The 'Needs' section shows a grid of checkboxes for various needs. A red box highlights the 'Needs' section.

Needs:	Check All	Cats	Dementia Care
✓ Diabetic Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Lifting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

“Skills” and “Needs” as shown on the Scheduling tabs of the Caregiver and Client records

# Enable Skills vs. Needs Conflicts

You can enable warnings for when there is a mismatch between the caregiver's skills and the client's needs.

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 box and callout 1), and Help. The left sidebar contains a tree view with categories like Agency Settings, Maintenance, Users & Roles, and Client Services. Under Agency Settings, 'Configuration' is selected (callout 2). The main content area is titled 'Configuration' and contains sub-tabs for Agency Configuration (callout 3), Rule Configuration, and Order Configuration. In the Agency Configuration section, the 'Disable Needs vs Skills' checkbox is unchecked (callout 4). A purple callout box points to this checkbox with the text: 'If unchecked, this will ensure warnings are generated if a Caregiver does not have a skill that a client needs'.

If enabled, a warning displays if a visit is scheduled with a Caregiver that does not have the skill that the client needs.

**Note:** This will not prevent scheduling the visit

The screenshot shows a 'Validation Errors' dialog box. It contains the text: 'Your new Order has validation problems listed below:'. Below this is a list of errors, with one item visible: 'Caregiver does not have the Client need of [Diabetic Care]'. At the bottom of the dialog are three buttons: 'Yes', 'No', and 'Cancel'.