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.

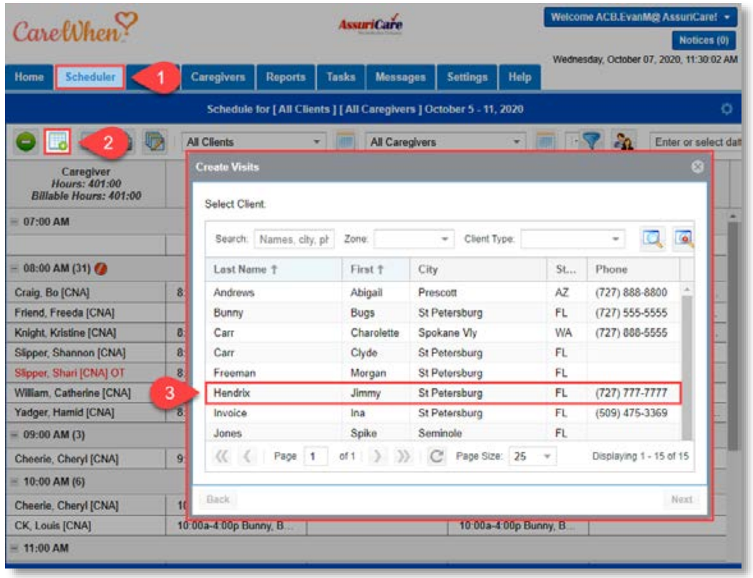
For instructions on charge codes, see the CareWhen Foundations training.

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

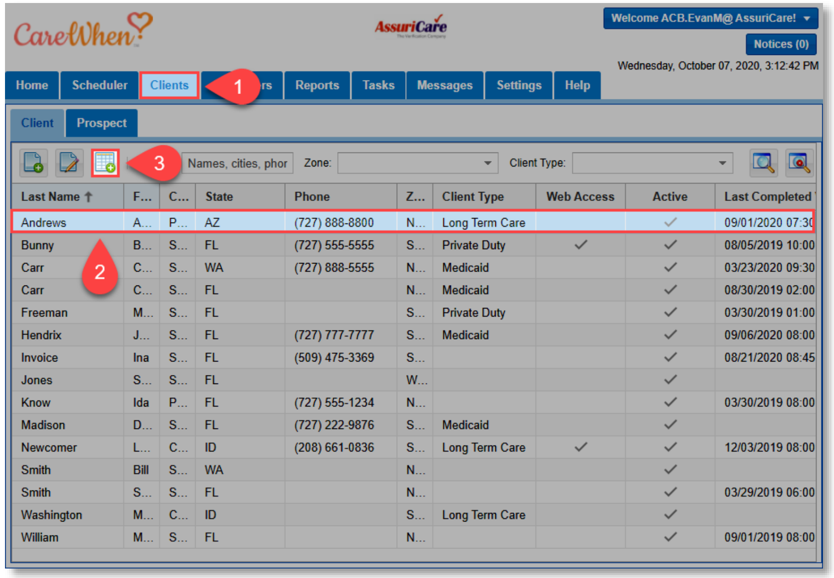
Creating Client Visits

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:

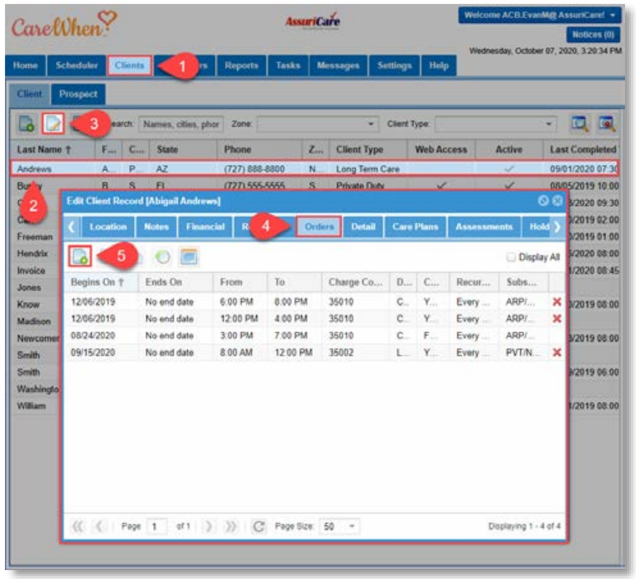
Via the Scheduler



Via the Clients tab

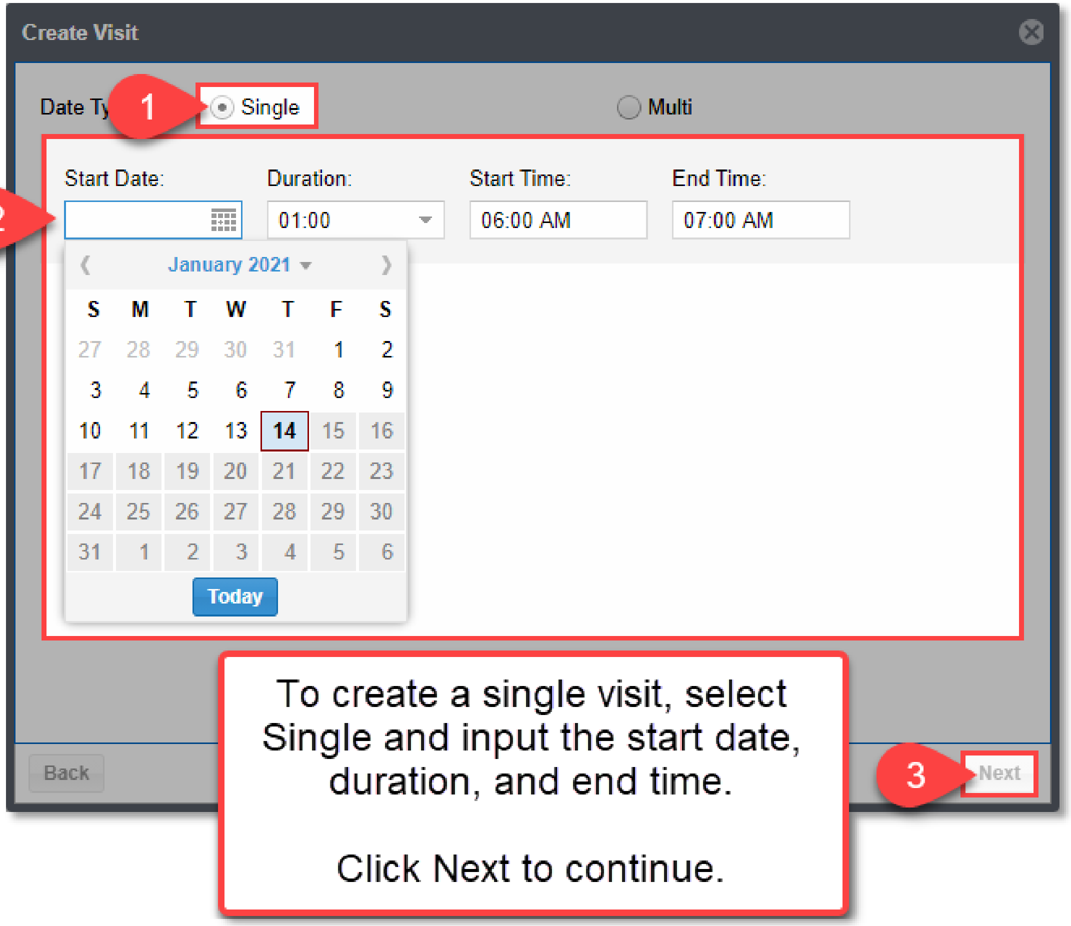


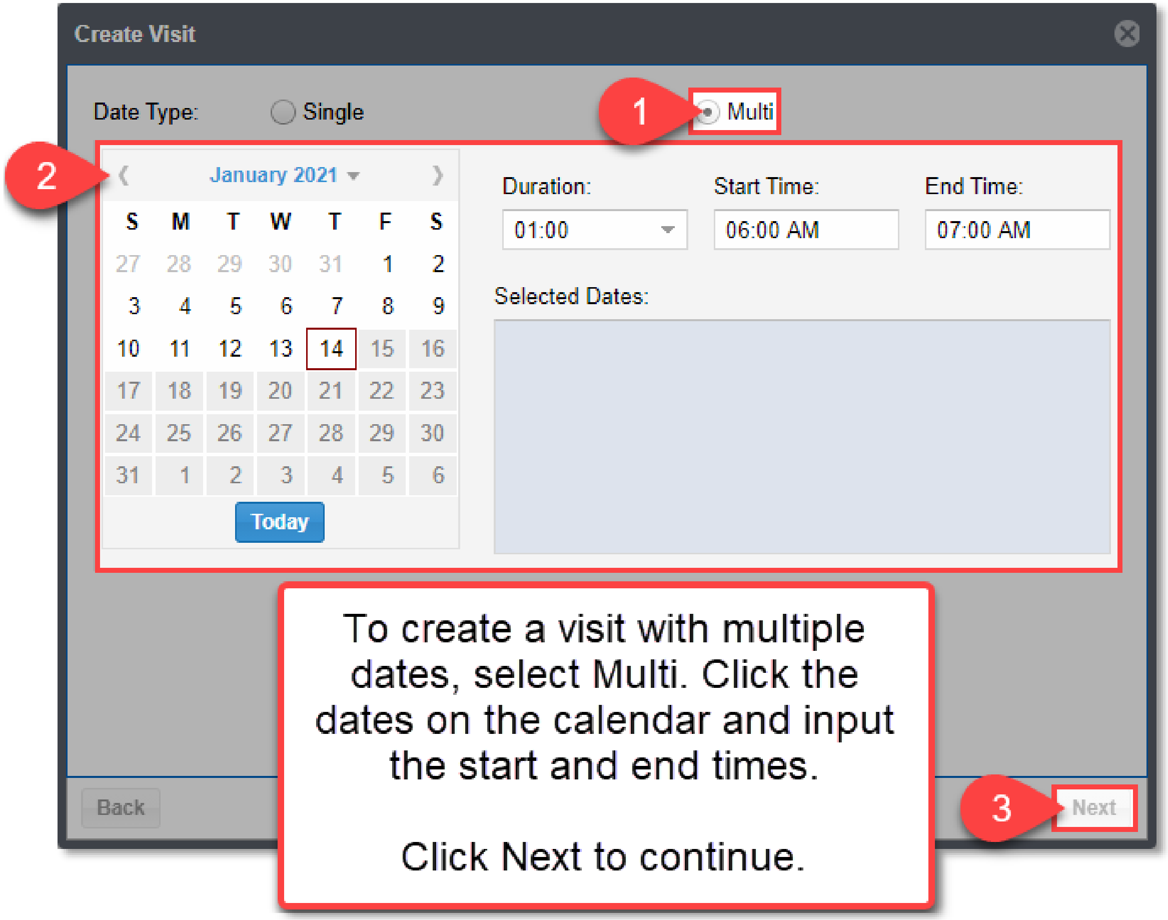
Via the Orders tab in the Client Record



Creating Client Visits

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



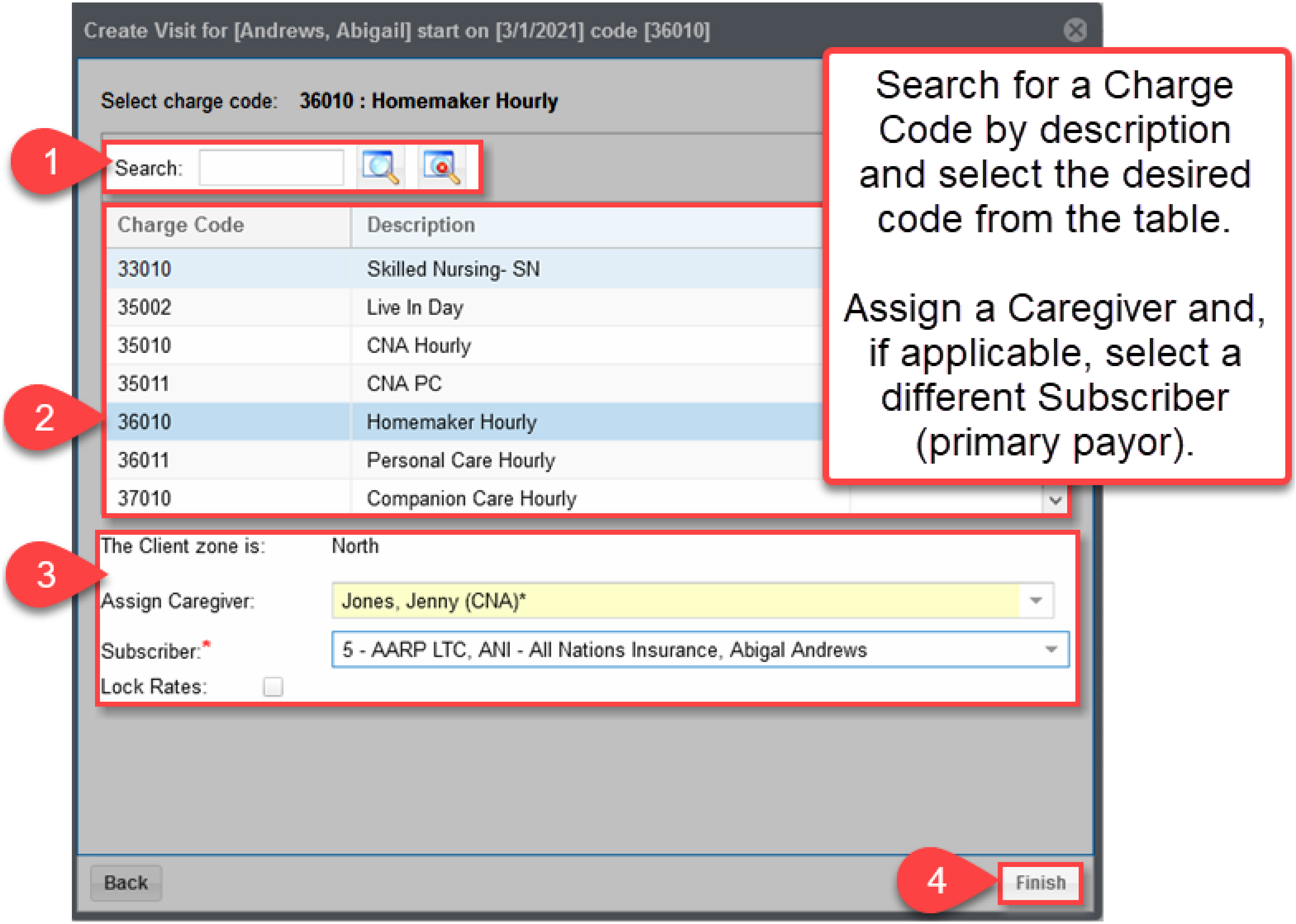


Creating Client Visits

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.



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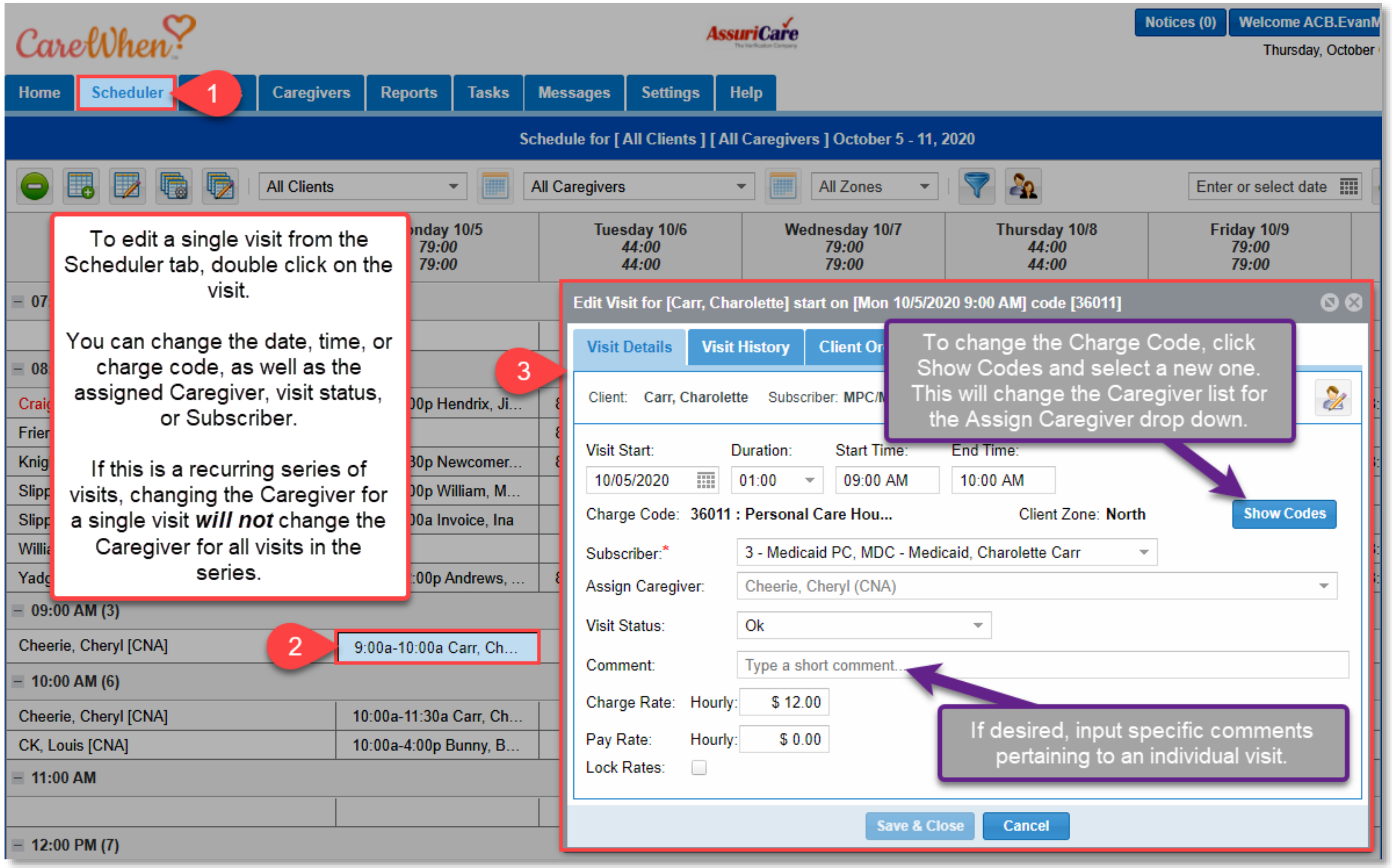
Edit Client Visits

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



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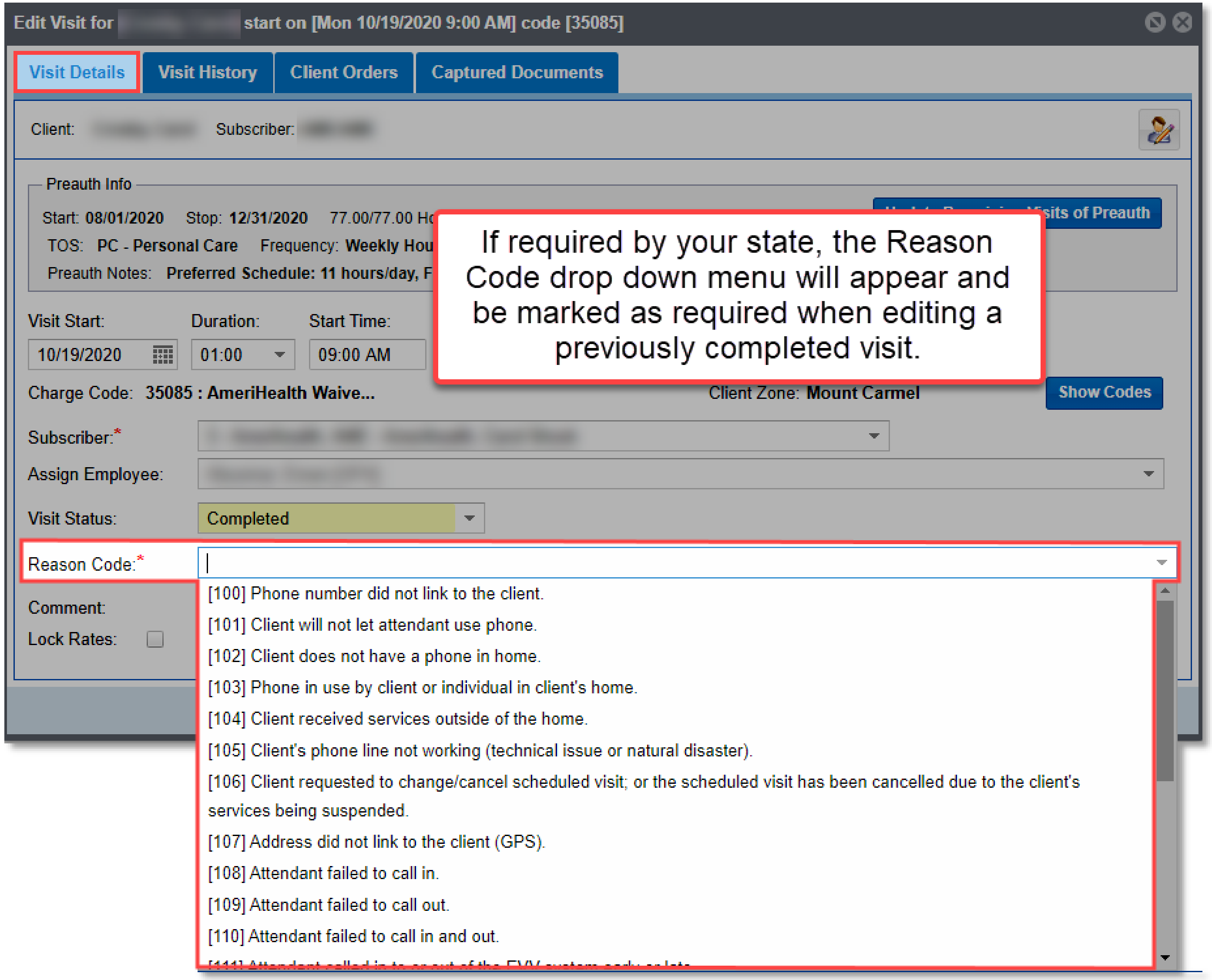
Edit Client Visits – Reason Codes

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.

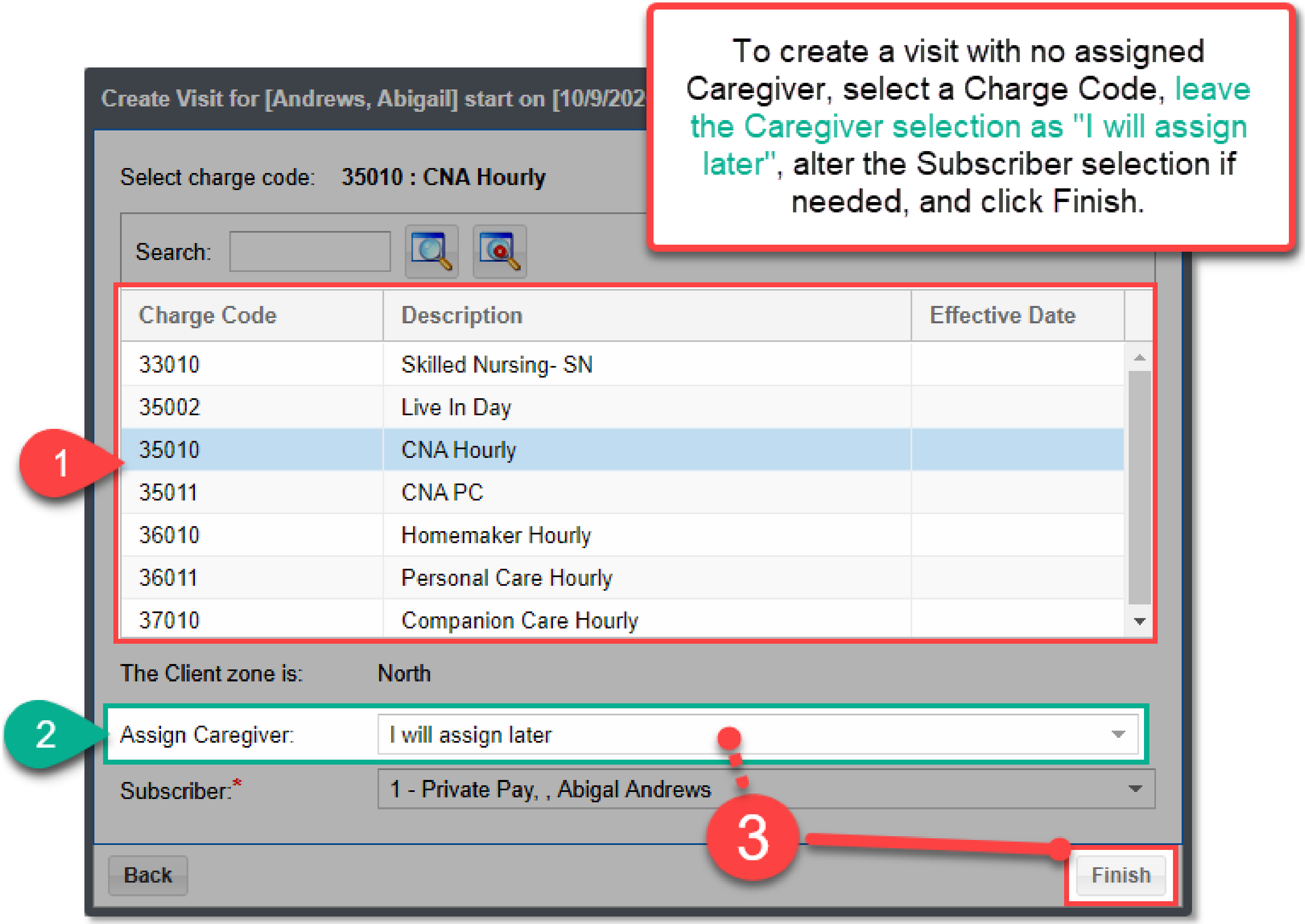
The dropdown menu will populate based on state-specific reason codes that have been hardcoded into CareWhen.



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.

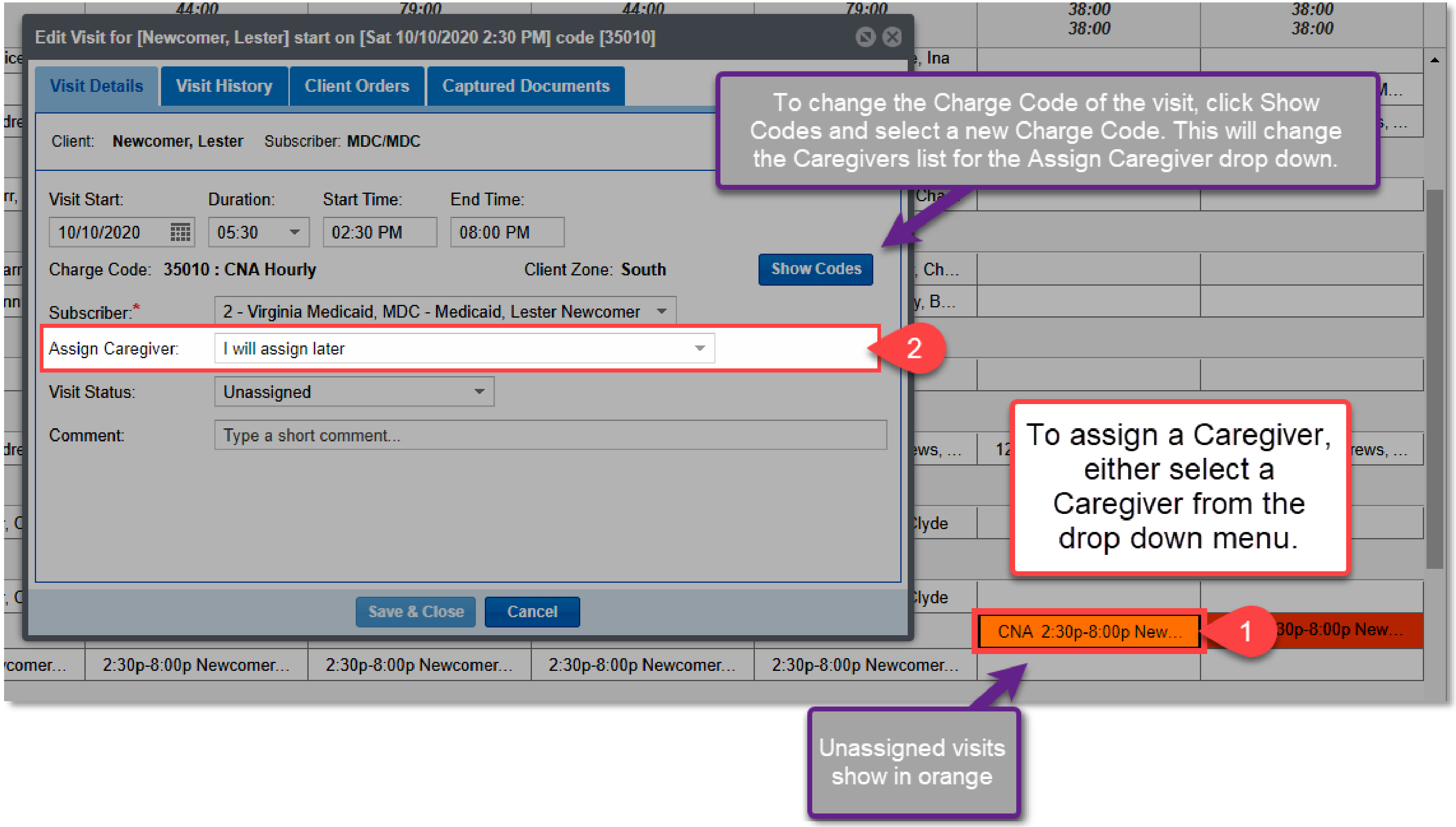
When doing, the caregiver will need to be assigned after the order has been placed. This process is found on the next page.



Assign Caregiver to Unassigned Visit

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

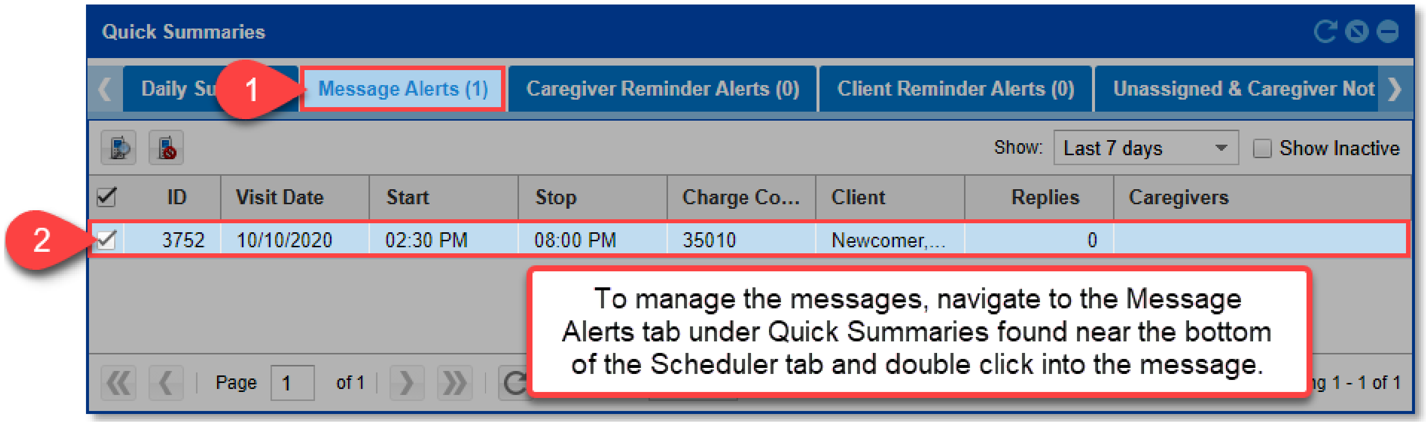
Note: The “Unassigned” status is typically associated with future visits only available in the full version of CareWhen.

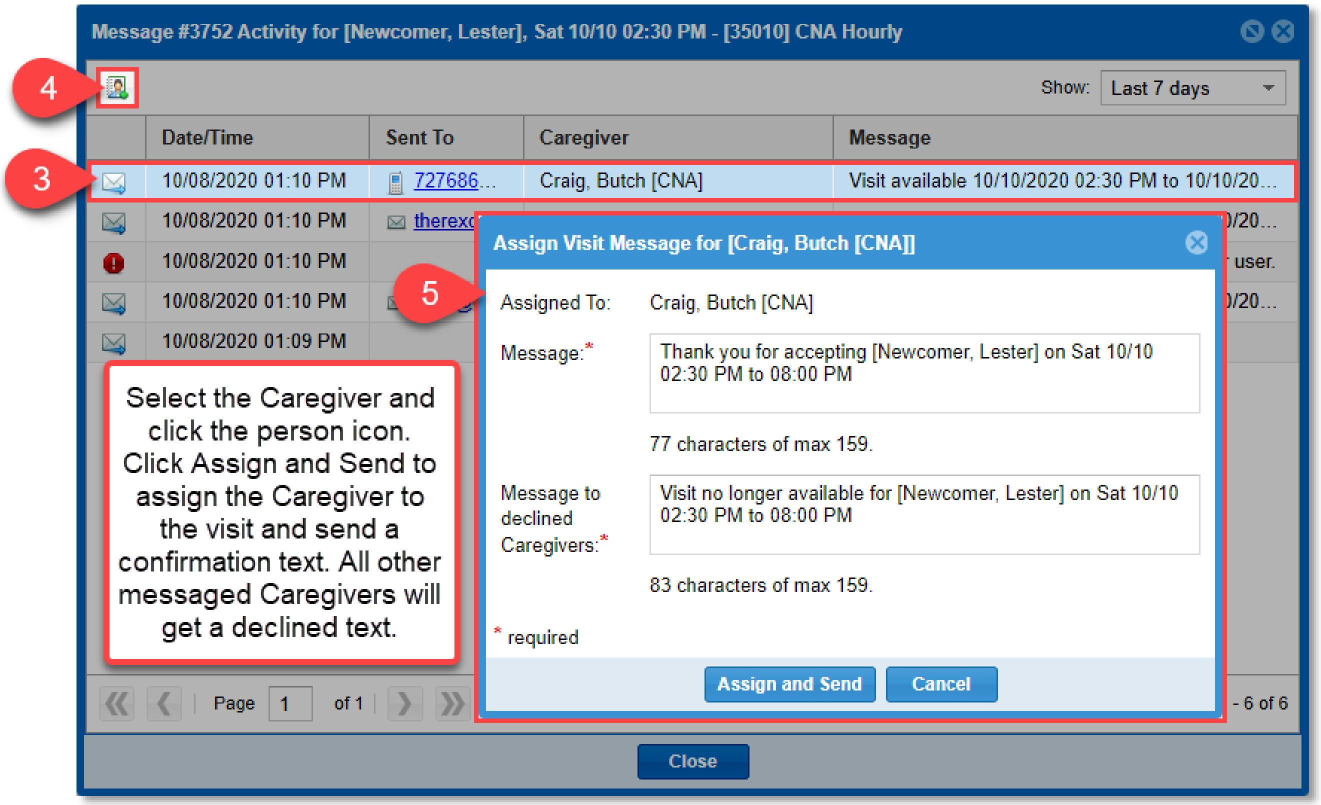


Manage Caregiver Visit Messages

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.





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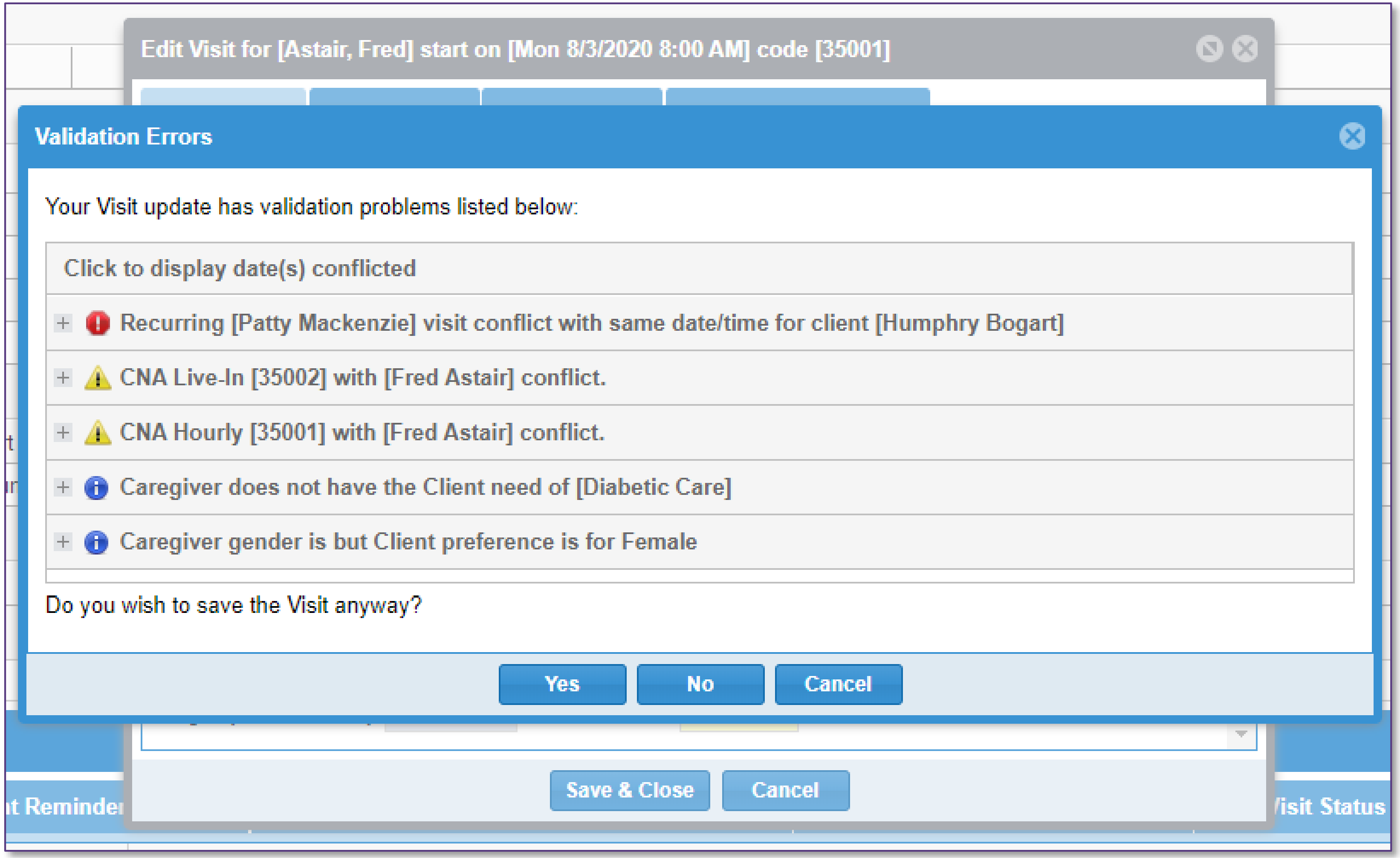
Visit Validation Errors

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



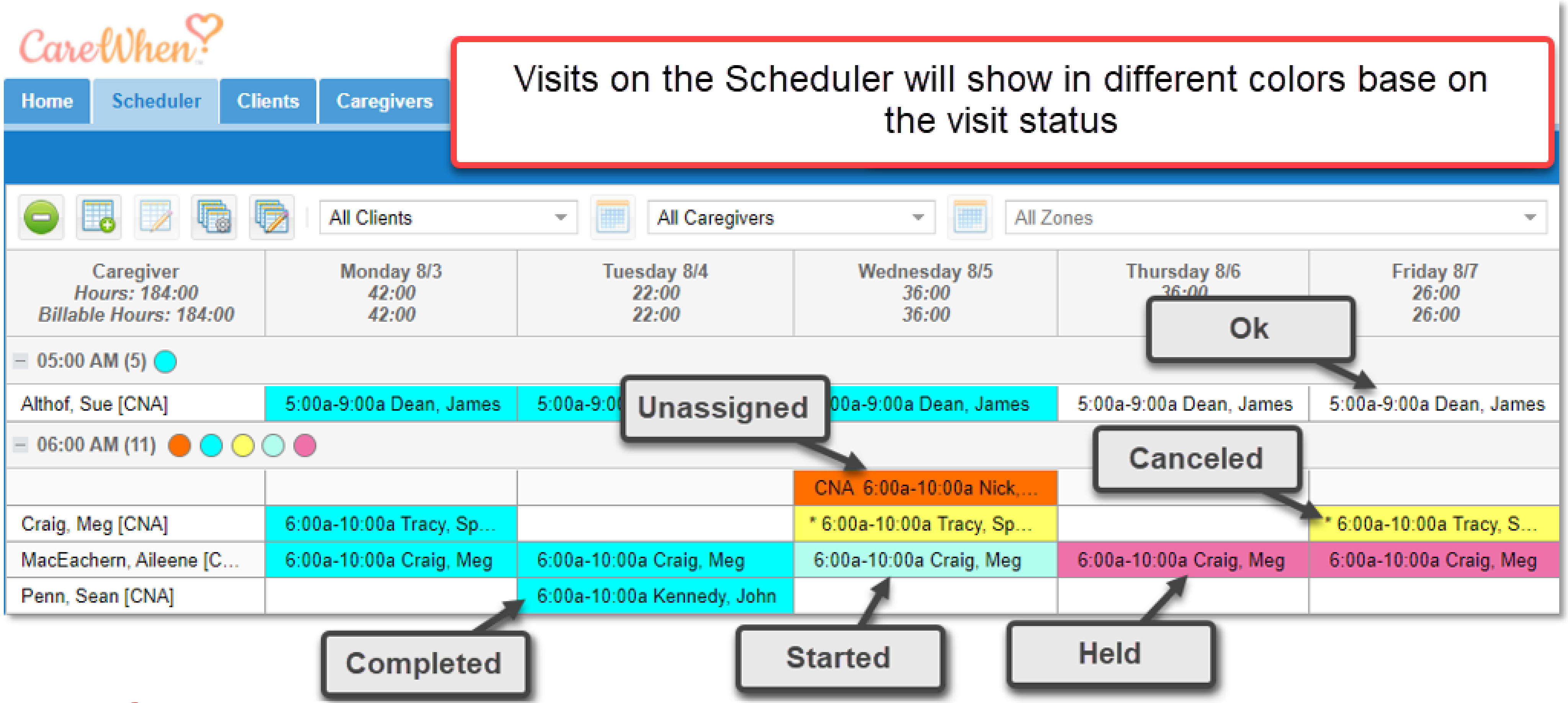
Note: Validation Errors generally only appear when scheduling visits in the future. These may not appear within CareWhen Lite.

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.



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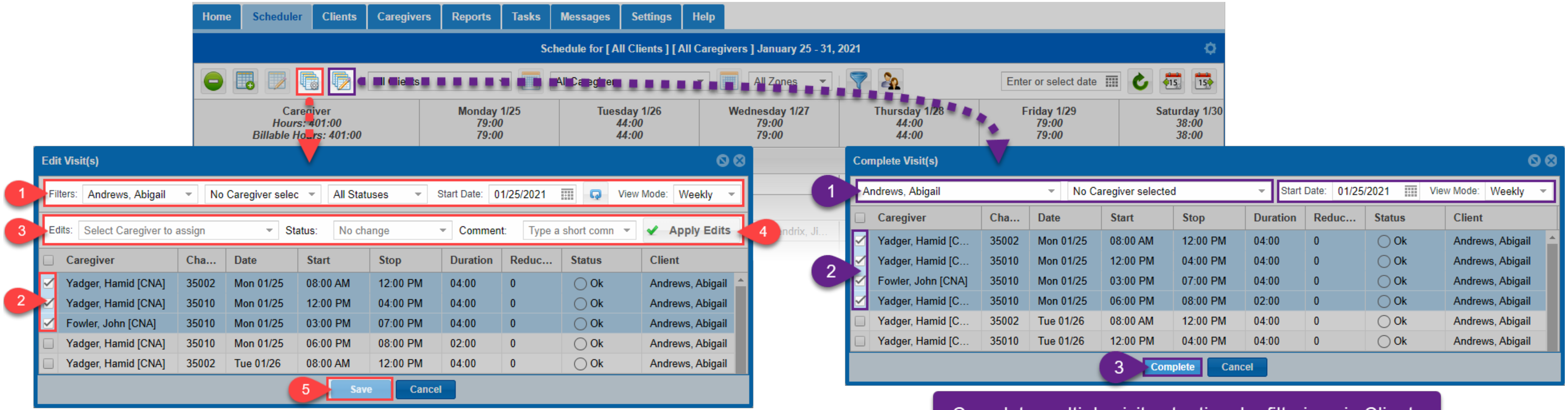
Using the Scheduler Tab

- 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.

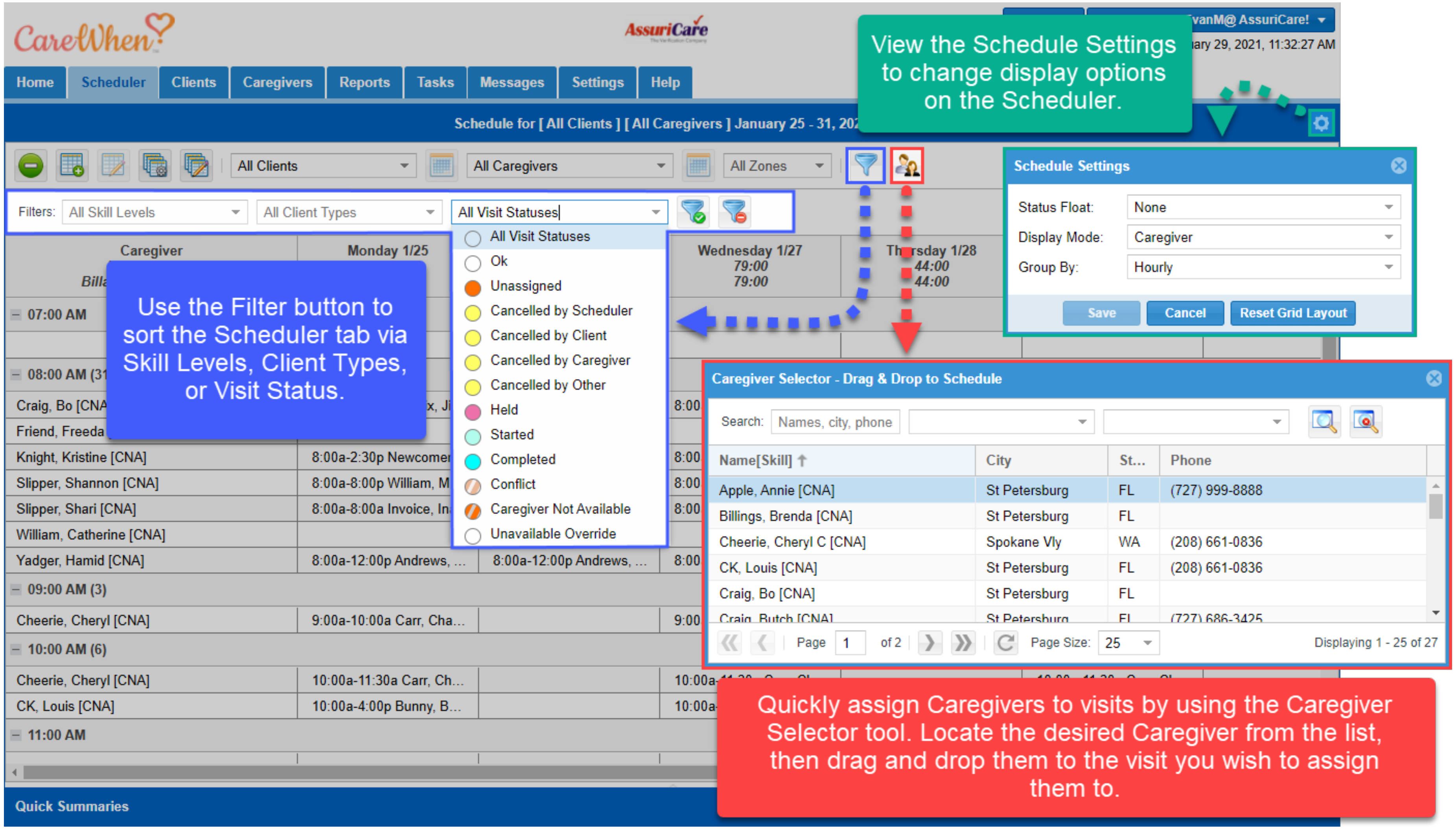
Click Apply Edits and Save.

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

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

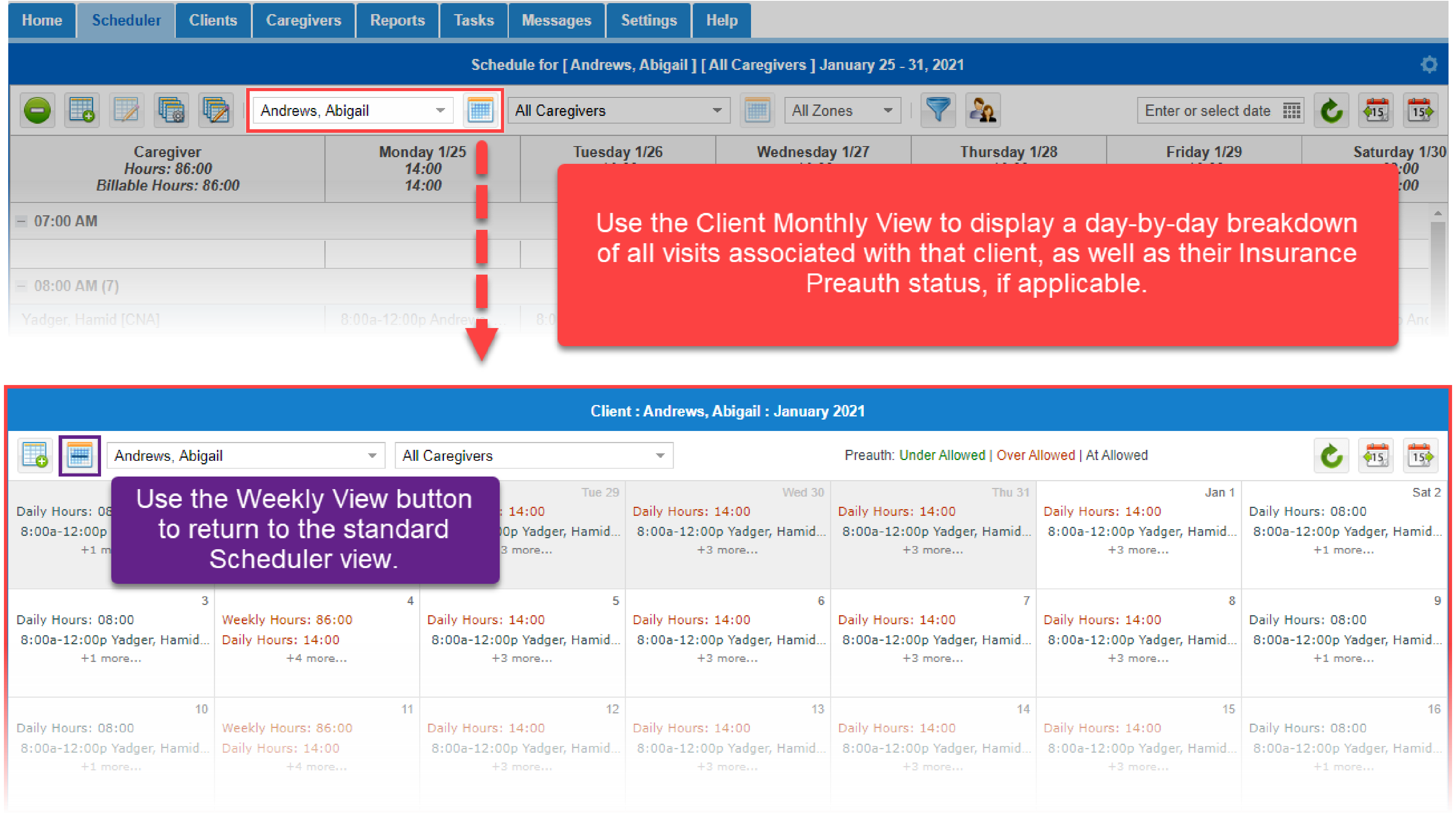
Using the Scheduler Tab

- 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



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



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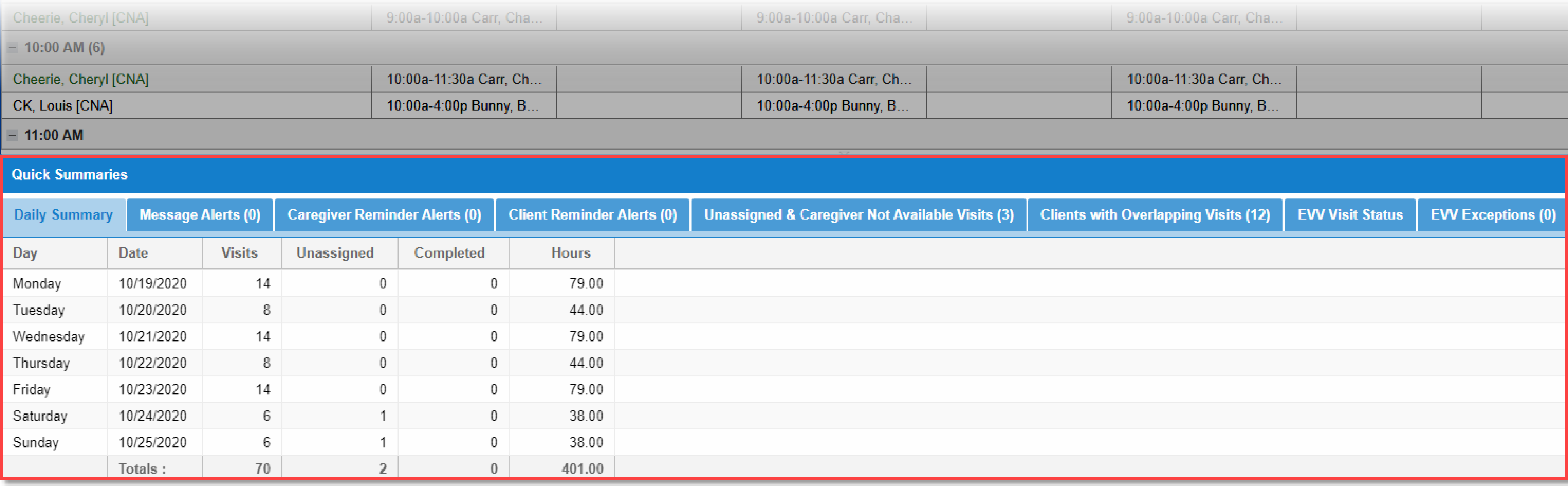
Scheduler Tab Quick Summaries

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).

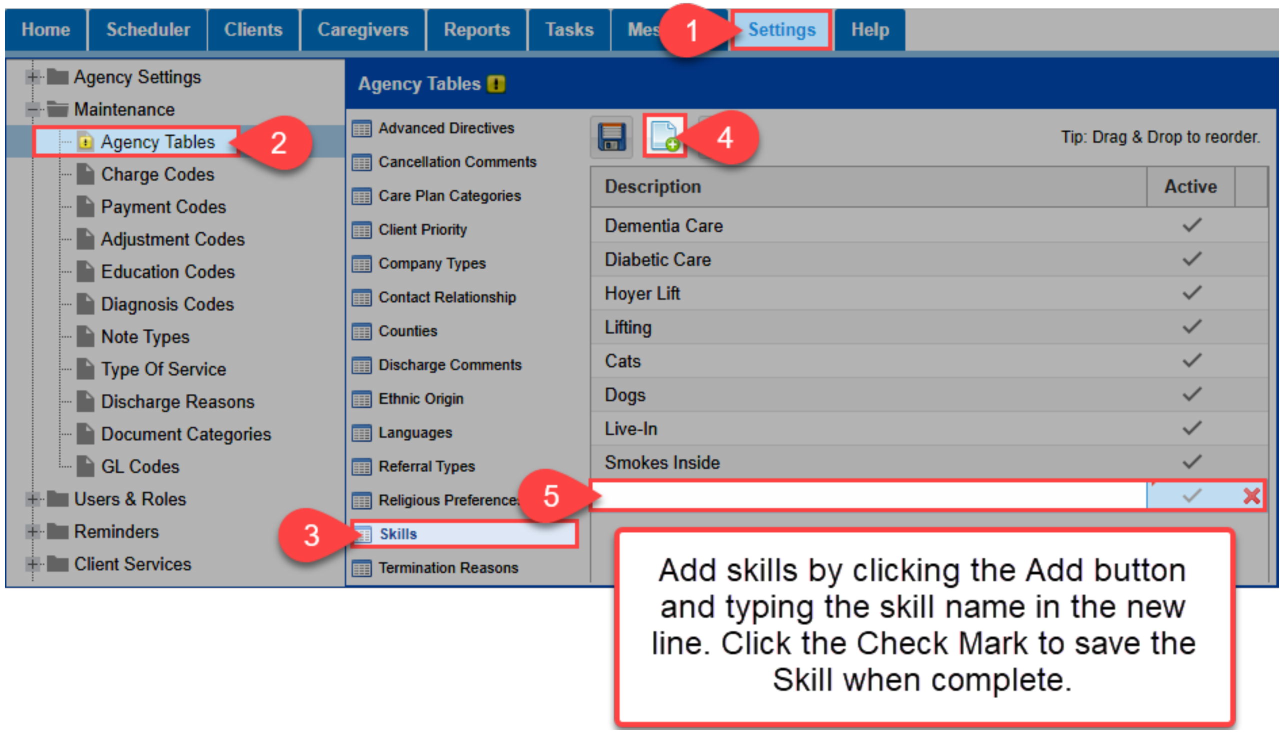


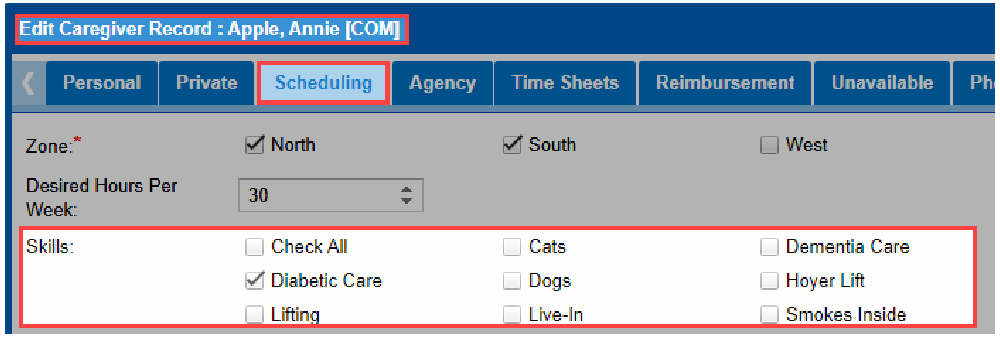
Day	Date	Visits	Unassigned	Completed	Hours
Monday	10/19/2020	14	0	0	79.00
Tuesday	10/20/2020	8	0	0	44.00
Wednesday	10/21/2020	14	0	0	79.00
Thursday	10/22/2020	8	0	0	44.00
Friday	10/23/2020	14	0	0	79.00
Saturday	10/24/2020	6	1	0	38.00
Sunday	10/25/2020	6	1	0	38.00
	Totals :	70	2	0	401.00

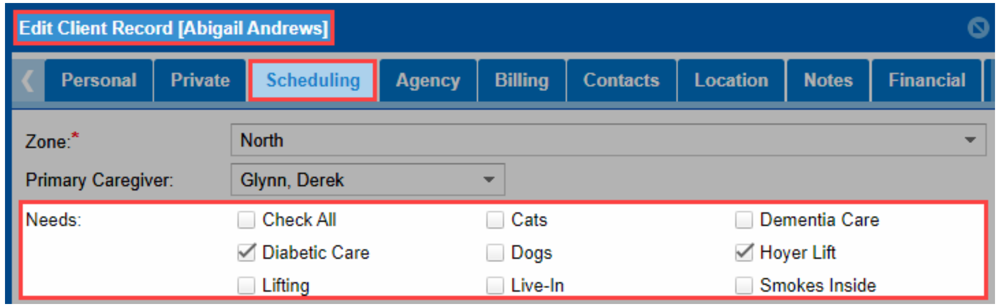
Appendix

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.







"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.

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*