



## CareWhen Lite Training

### Editing Caregivers



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.

# Editing a Caregiver – The Basics



The slides in this presentation will show the editable fields found on each tab, and spotlight user's common editing actions. At any point in the management process, you may click the “Close”, “Save”, or “Save and Close” buttons at the bottom of the screen.

*To learn how to set up the dropdown options for caregiver tab fields, see the CareWhen Configuration training.*

# Editing a Caregiver – The Basics

Once a Caregiver has been added to CareWhen, there are many options available to help you edit their information and manage their account. The basics of the editing functionalities fall into three categories:



## Edit Information

Update personal and private info  
Manage contacts



## Scheduling

Add Caregiver Skills and Familiar Clients  
Set Unavailability



## Records

Set reminders  
Add notes  
Manage time sheets  
View Caregiver record history



Additional Caregiver functionality, such as Reminders and Visits Alerts, are available in the full version of CareWhen.

# Editing a Caregiver – Getting Started

To access the editing options for a Caregiver within CareWhen, navigate to the Caregivers tab, select the Caregiver you'd like to manage, and then click the edit icon. Additionally, the Caregiver's name may be double clicked to begin editing.

The screenshot shows the CareWhen web application interface. At the top, there's a navigation bar with tabs: Home, Scheduler, Clients, Caregivers (highlighted with a red circle and '1'), Reports, Tasks, Messages, Settings, and Help. To the right of the navigation bar, there's a user greeting 'Welcome ACB.EvanM@ AssuriCare!' and a date/time stamp 'Monday, September 14, 2020, 5:09:25 PM'. Below the navigation bar, there's a search bar with a dropdown menu showing 'Names, cities, phor'. To the right of the search bar, there's a 'Zone' dropdown and a 'Skill Level' dropdown. Below these, there's a table of caregivers. The first row of the table is highlighted with a red circle and '3'. The table has columns: Last Name, First, Skill Level, City, State, Phone, Zone, Hire Date, Active, and Last Completed Visit. The first caregiver is 'Apple, Annie', with skill level 'COM', city 'St Petersburg', state 'FL', phone '(727) 999-8888', zone 'North, South', hire date '2/19/2019', active status '✓', and last completed visit '08/20/2019 08:00 AM'. Below the table, there's a pagination bar showing 'Page 1 of 2' and a 'Page Size' dropdown set to '25'. At the bottom right, it says 'Displaying 1 - 25 of 26'. A red circle and '2' highlight the edit icon (a pencil) in the top left corner of the table.

Last Name ↑	First ↑	Skill Level	City	State	Phone	Zone	Hire Date	Active	Last Completed Visit
Apple	Annie	COM	St Petersburg	FL	(727) 999-8888	North, South	2/19/2019	✓	08/20/2019 08:00 AM
Billings	Brenda	CNA	St Petersburg	FL		North, South	3/21/2018	✓	12/02/2019 02:30 PM
Cheerie	Cheryl	CNA	Spokane Vly	WA	(208) 661-0836	North	1/9/2019	✓	08/30/2019 02:00 PM
CK	Louis	CNA	St Petersburg	FL	(208) 661-0836	North, Sout...	3/12/2019	✓	03/29/2019 01:00 PM
Craig	Bo	CNA	St Petersburg	FL		North, Sout...	3/25/2019	✓	08/22/2020 04:15 PM
Craig	Butch	CNA	St Petersburg	FL	(727) 686-3425	North, Sout...	3/1/2019	✓	08/05/2019 08:00 AM

# Editing a Caregiver – Editing Information



## Personal Information Tab

Use the Personal tab to edit a Caregivers identifying information, as well as their address and contact information.

### Common Actions:

- Updating a Caregiver's address after a move
- Adding, removing, or updating a Caregiver's phone information
- Correct spelling issues

Reset a user's login information if required

Resend a Caregiver's account activation information

Edit Caregiver Record : Apple, Annie [COM]

**Personal**

Caregiver ID: 13 [Auto] ☒ Active



First Name: Annie Middle: Last: Apple Suffix: Credentials:


Address:


Address 2:

City: St Petersburg State/Pr: Florida Postal Code: 33705

Primary Email: aapple@domain.com Secondary:

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

Prior...	Name	Number	Memo
1	 Home	(727) 999-8888	

\* required  read only User Name: ACB.AnnieA

When updating a Caregiver's address, use the Address Validation button to verify your entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.



# Editing a Caregiver – Editing Information



## Private Information Tab

Use the Private tab to edit a Caregiver's secured information, such as SSN or EIN, birth date, and marital status.

### Common Actions:

- Remove a Caregiver from the Agency with a date and reason. By entering a removal date and reason, the caregiver will be marked as inactive once Saved.
- Change the skill level of the caregiver

The screenshot shows a web application window titled "Edit Caregiver Record : Apple, Annie [COM]". The "Private" tab is selected and highlighted with a red box. The form contains the following fields:

- Hire Date: 02/19/2019 (with a calendar icon)
- Birth Date: 05/14/1985 (with a calendar icon) | Age: 35
- Gender: ☐ Male, ☒ Female, ☐ Not Specified
- Social Security: 222-44-6666
- EIN: (empty field)
- Skill Level: COM (dropdown menu)
- Marital Status: ☐ Single, ☐ Married
- Payroll Number: (empty field)
- Termination Date: (empty field with a calendar icon)
- Termination Reason: (empty dropdown menu)
- Ethnic Origin: (empty dropdown menu)
- Can Drive: ☐

At the bottom, there is a legend: "\* required" and a lock icon followed by "read only".

# Editing a Caregiver – Editing Information



## Photo Tab

Use the Photo tab to upload a photo of the Caregiver to be used in CareWhen.

### Common Actions:

- Update a Caregiver's photo by selecting a new version from your computer

Edit Caregiver Record : Apple, Annie [COM]

Photo

Photo File:  Select photo 1

2 Upload Reset

Clicking "Select Photo" will open a browser allowing you to choose a photo from your computer

# Editing a Caregiver – Editing Information



## Contacts Tab

The Contact tab allows you to add, delete, or edit points of contact for the Caregiver, such as a doctor or family member.

### Common Actions:

- Add backup contacts for a Caregiver to ensure that there is a way to contact them in case of emergencies.

The screenshot shows the 'Edit Caregiver Record : Apple, Annie [COM]' window. The 'Contacts' tab is selected and highlighted with a red box. Below the tab, there are icons for adding, editing, deleting, and refreshing contacts. A table with columns 'Last Name', 'First Name', 'Company', 'Contact ...', 'Address', 'Phones/Email Address', and 'Comment' is shown, with the message 'No contacts added.' below it. A purple arrow points from the 'Add' icon to the 'Add New Contact' modal. The modal contains the following fields:

- Type: \* (dropdown menu set to 'Employer')
- Relationship: (dropdown menu)
- First Name: \* (text field)
- Middle: (text field)
- Last: (text field)
- Suffix: (text field)
- OR
- Company: \* (text field set to 'Medical Inc.')
- Gender: (dropdown menu set to 'Not Applicable')
- Address: (text field)
- Address 2: (text field)
- City: (text field)
- State/Pr: (dropdown menu)
- Postal Code: (text field)
- Email: (text field)
- Comment: (text area)
- Phones: (section with add/edit icons and a tip: 'Tip: dbl-click line item to edit phone. Drag & Drop to reorder.'
- Table with columns: Prior..., Name, Number, Memo
- Message: 'No phones found.'
- \* required
- Buttons: 'Save & Close' and 'Cancel'

# Editing a Caregiver – Scheduling



## Scheduling Tab

Use the Scheduling tab to edit information pertaining to a Caregiver's scheduling options.

### Common Actions:

- Add Familiar Clients to the Caregiver's record
- Edit the caregiver's assigned zones
- Edit the Caregiver's Skills designations. These will be used to match up with Client needs (if enabled)
- Enable text messages
- Update a Caregivers desired hours

**Edit Caregiver Record : Apple, Annie [COM]**

**Scheduling**

Zone: ☒ North ☒ South ☐ West

Desired Hours Per Week: 30

Skills: ☐ Check All ☒ Diabetic Care ☐ Lifting ☐ Cats ☐ Dogs ☐ Live-In ☐ Dementia Care ☐ Hoyer Lift ☐ Smokes Inside

Gender Preference: ☐ Female ☐ Male ☒ No Preference

Familiar Clients:

Familiar Clients ↑	
Andrews, Abigail	×
Bunny, Bugs	×

2 Items

Acceptable message types: ☒ Email ☒ Text\*

Scheduling Comment:

Enable Upcoming Alerts: ☐

\* required 📄 read only

Familiar Clients will be automatically populated when a Caregiver has completed visits for that Client

# Editing a Caregiver – Records



## Notes Tab

Use the Notes tab to enter or edit notes pertaining to the Caregiver you'd like to manage. See the *CareWhen Configuration* training for instructions on how to set up note types.

### Common Actions:

- Add notes regarding rate changes, complaints, billing, or other specific communications relating to the Caregiver.
- Copy notes to Client's accounts via the tool bar.

Expand all note details on the tab

Use the tool bar to edit existing notes, copy them to clients accounts, delete notes, and view note history.

Notes

Search: Enter text Note Type: Filter note types...

09/14/2020 - Missing Information Family Request

Posted: 09/14/2020 01:21 PM by Evan Morse  
Family must provide us with missing Client information.

Page 1 of 1 Page Size: 15

**Add Note**

Date:\* 09/14/2020 Note Type:\* Family Request

Subject:\* Missing Information

Family must provide us with missing Client information.

55 characters of max 3000.

\* required

Save & Close Cancel

# Editing a Caregiver – Records



## Message History Tab

- The Text Message tab keeps a record of “Find Availability” text messages that have been sent to Caregivers, as well as their replies.
- AIM Messages keeps a log of all Agency Internal Messages and conversations involving a Caregiver that has “AIM Recipient” enabled from the Agency tab.
- *See the Creating & Managing Visits training for more information and instructions on how to find available caregivers using this functionality.*

Edit Caregiver Record : Apple, Annie [COM]

Message History

Text Messages AIM Messages

Show: Last 7 days

Date/Time	Sent To	Message
No message activity found.		

Page 0 of 0 Page Size: 25 No data to display

Text Messages AIM Messages

Tip: Click message to view responses. Search: Sent By, Subject, M Show: Last 7 days

ID	Message Date	Sent By	Viewed By	Subject	Last Update
No messages found.					

Page 0 of 0 Page Size: 25

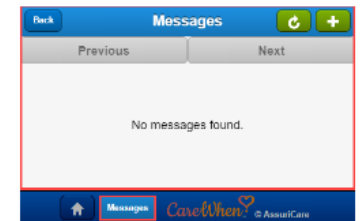
Message Threads

Message

No message thread found for selection.

Use the search functionality to narrow which messages are displayed.

AIM Messages are HIPAA compliant messages sent to a Caregiver via the CareWhen mobile app.



# Editing a Caregiver – Records



## Files Tab

From the Files tab, you can upload and store required files for a Caregiver's profile. File types are tied to User Roles, and designated file categories are created in the Agency Settings tab. See the *CareWhen Configuration* training for more instructions.

### Common Actions:

- Upload copies of certifications and caregiver rate agreements

Use the tool bar to search for uploaded files by file category or name.

Use the Add button to upload documents from your computer

Files in CareWhen may be downloaded or deleted here

File Name	Category	Description	Status	Created On	Uploaded ...	Downlo...	Actio...
Test Document Upload.pdf	Certifications	This is a test document	Completed	09/14/2020...	Evan Morse		

# Editing a Caregiver – Records



## History Tab

The History tab can be used to review any changes to the Caregiver's record that have been made in CareWhen.

Edit Caregiver Record : Apple, Annie [COM]

< History >

Filter: Select field name... All Dates

Date ↓	Field Name	Old Value	New Value
09/14/2020 12:46 PM	Insert by Morse, Evan <b>Desired Hours Per Week:</b>		30
09/14/2020 12:46 PM	Update by Morse, Evan <b>Zone:</b>	North-South West	North, South
09/14/2020 12:45 PM	Insert by Morse, Evan <b>Skills:</b>		Diabetic Care
09/14/2020 12:45 PM	Insert by Morse, Evan <b>Familiar Clients:</b>		Andrews, Abigail, Bunny, Bugs