AssuriCare

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.

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

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

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.

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

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

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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

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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.

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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	☐ Cats	☐ Dementia Care
	☑ Diabetic Care	☐ Dogs	☐ Hoyer Lift
	☐ Lifting	☐ Live-In	☐ Smokes Inside
Gender Preference:	○ Female	○ Male	⦿ No Preference

Familiar Clients:

Familiar Clients ↑	
Andrews, Abigail	✕
Bunny, Bugs	✕

2 items

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

| Acceptable message types: | ☑ Email | ☑ Text* |
| Scheduling Comment: | |

Enable Upcoming Alerts: ☐

* required 🔒 read only

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

Editing a Caregiver – Records

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.

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

Expand all note details on the tab

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

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.*

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

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

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Editing a Caregiver – Records

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

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