



CareWhen Lite Training

Editing Clients



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 Client – The Basics



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

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



For more control over Clients in CareWhen, including adding new Clients and using the Prospective Client feature, upgrade to the full version of CareWhen.

Editing a Client – The Basics

Once a Client has been added to CareWhen, there are many options available to help you edit their information and manage their account. The basics of the management functionality fall into four categories:



Edit Information

Update personal and private info
Manage contacts
Discharge clients



Scheduling

Set up orders
Establish client zones
Setup Pre-Authorizations



Billing

Set Client rates

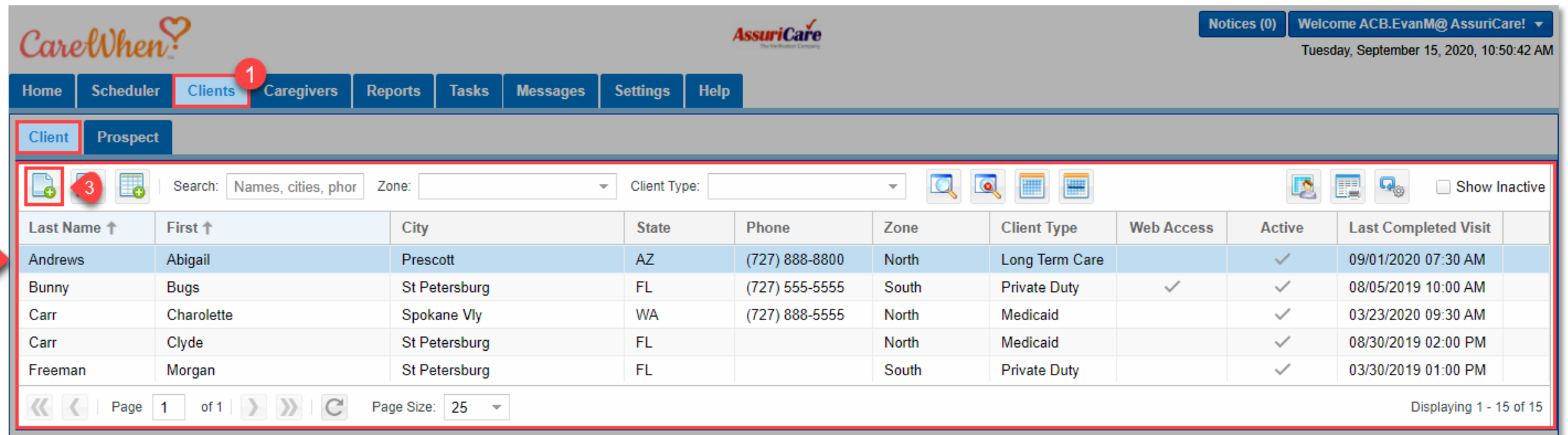


Records

Add notes
Manage documents

Editing a Client – Getting Started

To access the editing options for a Client within CareWhen, navigate to the Clients tab, select the Client you'd like to manage, and then click the edit icon. Alternatively, Client names may be double clicked to open the edit functionality.



The screenshot shows the CareWhen interface with the following elements:

- Header:** CareWhen logo, AssuriCare logo, Notices (0), and Welcome ACB.EvanM@ AssuriCare! (Tuesday, September 15, 2020, 10:50:42 AM).
- Navigation Bar:** Home, Scheduler, **Clients** (highlighted with a red box and a red circle with the number 1), Caregivers, Reports, Tasks, Messages, Settings, Help.
- Sub-Tab Bar:** **Client** (highlighted with a red box and a red circle with the number 2), Prospect.
- Search Bar:** Search: Names, cities, phor. Zone: [dropdown]. Client Type: [dropdown].
- Table:** A table with 10 columns: Last Name ↑, First ↑, City, State, Phone, Zone, Client Type, Web Access, Active, Last Completed Visit. The table contains 5 rows of client data.
- Footer:** Page 1 of 1, Page Size: 25, Displaying 1 - 15 of 15.

Last Name ↑	First ↑	City	State	Phone	Zone	Client Type	Web Access	Active	Last Completed Visit
Andrews	Abigail	Prescott	AZ	(727) 888-8800	North	Long Term Care		✓	09/01/2020 07:30 AM
Bunny	Bugs	St Petersburg	FL	(727) 555-5555	South	Private Duty	✓	✓	08/05/2019 10:00 AM
Carr	Charolette	Spokane Vly	WA	(727) 888-5555	North	Medicaid		✓	03/23/2020 09:30 AM
Carr	Clyde	St Petersburg	FL		North	Medicaid		✓	08/30/2019 02:00 PM
Freeman	Morgan	St Petersburg	FL		South	Private Duty		✓	03/30/2019 01:00 PM

Editing a Client – Editing Information



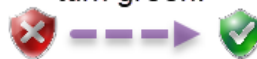
Personal Information Tab

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

Common Actions:

- Updating a Client's address after a move
- Adding, removing, or updating a Client's phone information
 - Multiple numbers can be dragged and dropped in order of priority.
- Correct spelling issues

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 Client Record [Abigail Andrews]


Personal

Client ID:* 10 [Auto] ☒ Active



First Name:* Abigail Middle: Last:* Andrews Suffix: Credentials:


Address: 7280 N Stable Ln


Address 2:


City:* Prescott State/Pr:* Arizona Postal Code:* 86305-8991 


County: Personal Email: alann@august-systems.com


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

Prior...	Name	Number	Memo
1	 Home	(727) 888-8800	

Referral Source: Referral Date: 

Initial Contact: Contact Date: 

Home Visit Conducted By: Conducted Date: 

* required  read only User Name: ACB.AndrewsA

A Zip + 4 is required for Medicaid Billing

Client phone numbers will be used for any Telephony EVV check-ins

Editing a Client – Editing Information



Private Information Tab

Use the Private tab to edit a Client's secure information, such as SSN, birth date, and marital status.

Common Actions:

- Correcting issues with information entered during the Adding a Client process
- Adding Advanced Directives or a Medicaid ID, which is required for Medicaid Billing

Edit Client Record [Abigail Andrews]

Private

Social Security:* 369-85-2147

Referring Doctor: [Dropdown]

Birth Date:* 11/07/1932 Age: 87

Gender:* ☐ Male ☒ Female ☐ Not Specified

Ethnic Origin: [Dropdown]

Language: [Dropdown]

Marital Status: ☐ Single ☐ Married

Height: [Text Box]

Weight: [Text Box]

Occupation: [Text Box]

Religious Preference: [Dropdown]

Employment Status: [Dropdown]

Advanced Directives: ☐ DNR ☐ Full Code ☐ Living Will
☐ Medical Power of Attorney ☐ Power of Attorney

Medicaid ID: [Text Box]

Custom External ID: [Text Box]

* required ⓘ read only

Editing a Client – Editing Information



Agency Tab

Use the Agency tab to edit a Client's Agency status. This page is primarily used to discharge a client, but also contains toggles for EVV specific features such as Signature Capture and GPS Validation.

Common Action:

- Discharge a client and input discharge specifics
 - Once a Discharge date and reason is entered, the client will be marked as inactive. Make sure that all visits are complete and paid before making a client inactive.

Edit Client Record [Abigail Andrews]

Agency

Client Type: Long Term Care

Admit Date: 02/15/2019 Service Period:

Discharge Date:

Discharge Reason:

Discharge Comment:

Diagnosis

Priority	Code	Description	
1	Z74.1	Need for a...	✗

Client Priority Code:

Signature Capture: ☒

Disable GPS Validation: ☐

Billing ID: Ext Billing ID

Receive Emailed Documentation: ☒

Documentation Email: alann@august-systems.com

Web Access: ☐

Allow Flexible Scheduling: ☒

Default Charge Code for Flexible Visits: 35010 CNA Hourly

* required 📄 read only

If enabled via EVV settings, Signature Capture for visits can be toggled here.

Disable GPS Validation should remain *unchecked* unless a Client receives services in an area without data reception, or at a location outside of their home.

The default Charge Code for flexible visits will be the code used in the event of an unscheduled visit made to the client

Editing a Client – Editing Information



Contacts Tab

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

Common Actions:

- Add new primary contacts to the Client's account
- Select Alternate Address Type to allow Caregivers to clock-in from a different location in addition to the Client's home.

The screenshot shows the 'Edit Client Record [Abigail Andrews]' window with the 'Contacts' tab selected. A callout box points to the toolbar with the text: 'Use the tool bar to edit and delete existing Contacts'. The toolbar contains icons for adding, editing, and deleting contacts. Below the toolbar is a table with columns: Last Name, First Name, Company, Contact, Address, Phones/Email Address, and Comment. The table is currently empty, displaying 'No contacts added.' Below the table is the 'Add New Contact' modal form. The form includes fields for Type (set to 'Family'), Relationship, First Name, Middle, Last, Suffix, Company, Gender (set to 'Not Applicable'), Address, Address 2, City, State/Pr, Postal Code, Email, and Comment. There is also a 'Phones' section with a toolbar for adding and editing phone numbers, and a table with columns: Prior..., Name, Number, and Memo. The table is currently empty, displaying 'No phones found.' A legend at the bottom indicates that '*' denotes required fields.

Use the tool bar to edit and delete existing Contacts

Edit Client Record [Abigail Andrews]

Contacts

Last Name	First Name	Company	Contact	Address	Phones/Email Address	Comment
No contacts added.						

Add New Contact

Type: * Family Relationship:
First Name: * Middle: Last: Suffix:
OR
Company: * Gender: Not Applicable
Address: Address 2:
City: State/Pr: Postal Code:
Email:
Comment:
Phones:
Tip: dbl-click line item to edit phone. Drag & Drop to reorder.
Prior... Name Number Memo
No phones found.
* required

Editing a Client – Scheduling



Scheduling Tab

Use the Scheduling tab to edit information relating to a Client's scheduling parameters, such as their Zone designation.

Common Actions:

- Modify the Client's Zone designation. Each client is assigned to one zone.
- Edit the Client's Needs. These will be used to match with Caregiver Skills.

Edit Client Record [Abigail Andrews]

Scheduling

Zone: North

Primary Caregiver: Glynn, Derek

Needs:

- ☐ Check All
- ☒ Diabetic Care
- ☐ Lifting
- ☐ Cats
- ☐ Dogs
- ☐ Live-In
- ☐ Dementia Care
- ☒ Hoyer Lift
- ☐ Smokes Inside
- ☐ No Preference

Gender Preference: ☐ Female ☐ Male

Familiar/Do Not Send:

Familiar Caregivers ↑		
Apple, Annie [COM]		×
Fowler, John [CNA]		
Yadger, Hamid [CNA]		×
3 items		

Don't Send Caregivers	Comment	
No Caregiver selected. Click Add button.		
0 items		

Scheduling Comment:

ClockWork Facility: No facility information set.

* required 📄 read only

Editing a Client – Scheduling



Orders Tab

The Order tab can be used by an Agency to schedule visits for a Client. You may edit existing orders here, as well. See the *Creating & Managing Visits* training for in depth instructions to create and edit visits.

Common Action:

- Schedule appointments for a Client by selecting a start date, time, and Caregiver. Make edits to the timing if necessary.

Use the tool bar to place an order, copy an order, edit an existing order, or view the Client's schedule

To place client Orders for future dates, and to use recurring visits, upgrade to the full version of CareWhen.

Begins On ↑	Ends On	From	To	Charge Co...	Caregiver	Recurrence	Subscriber	
12/06/2019	No end date	6:00 PM	8:00 PM	35010	Yadger, Hamid [CNA]	Every weekday	ARP/ANI	✗
12/06/2019	No end date	12:00 PM	4:00 PM	35010	Yadger, Hamid [CNA]	Every day	ARP/ANI	✗
08/24/2020	No end date	3:00 PM	7:00 PM	35010	Fowler, John [CNA]	Every weekday	ARP/ANI	
09/15/2020	No end date	8:00 AM	12:00 PM	35002	Yadger, Hamid [CNA]	Every day	PVT/None	✗

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Editing a Client – Scheduling



Care Plans Tab

The Care Plans tab is where all tasks to be performed for the Client by the Caregiver can be input one at a time. Each item on Care Plan can be populated with Service Tasks. Items on a Care Plan can be added, deleted, or edited.

Common Actions:

- Indicate which tasks are to be performed when completing a visit.

Use the tool bar to edit, copy, view the history of, or print a Care Plan.

Begin by adding a Care Plan and including a Comment

Add and Edit Service Tasks associated with the selected Care Plan

Edit Client Record [Abigail Andrews]

Care Plans

Show All

Status	Effective ↑	Tasks	Comments
Active	09/16/2020	1	This is a test Care Plan.

Page 1 of 1 | Page Size: 25 | Displaying 1 - 1 of 1

Care Plan ID:9870 Tasks - Effective: 09/16/2020

Cod...↑	Description	Category
11	Bathing- Bed bath	Personal C

Add New Task

Service Task.* 12 - Dressing

When Occurs: ☐ PRN ☐ Days of Week ☒ Every Visit

☒ Required

Comment: This is a test comment.

23 characters of max 3000.

* required

Editing a Client – Scheduling



Preauth Tab

The Preauth tab allows you to input pre-authorized care specifications for a Client. Preauth information is typically provided by an Insurance company and can be limited to set times and rates via the Add New Preauth area.

Configuration Note:

- Preauth's do not affect a Caregiver's ability to check in and check out for a visit.

Use the tool bar to edit or copy existing preauths for a client

Edit Client Record [Abigal Andrews]

Preauth

Starts ↑ Ends

No items found.

Page 0

Add New Preauth [Abigal Andrews]

Type of Service:* AC - Attendant Care

Subscriber:* 1 - Private Pay, , Abigal Andrews

Unit Type:* ☒ Visits ☐ Hours ☐ Miles

Allowed Value:* 13.00

Frequency:* Daily

Date Range:* Start: 09/17/2020 End: 09/30/2020

Authorization #:

Notes:

* required

Add Cancel

Display All

No data to display

Editing a Client – Scheduling



EVV Tab

The EVV tab is used to view and edit information pertaining to a Client visit or telephony event, including details on check in / check out timing, electronic signature verification, visit history, and the GPS location.

Common Actions:

- View uploaded documents which have been sent to the CareWhen mobile app.

Edit Client Record [Abigail Andrews]

EVV

manual clock-in/out has refused tasks Show: Last 30 days

ID	Call In	Call Out	Caregiver	Message	Task(s)	GPS	ESC	Co...	Docs
2737...	09/01/2020 07:37 AM		Fowler, John [CNA]	No	0	✓			
2737...	09/01/2020 07:27 AM	09/01/2020 07:34 AM							

Page 1 of 1 Page Size:

[2737190] Event Details for Abigail Andrews

Info Electronic Signature Visit History GPS

Caregiver: Fowler, John [CNA] Service: [HHA] Home Health Aide Services

EVV Details

Call In: 09/01/2020 07:27 AM
Call Out: 09/01/2020 07:34 AM
Duration: 00:07
Miles: 0
Errand Miles: 0
Travel Time: 0

Completed Tasks

Task ↑	Comple...	Co...
No tasks found.		

Comment:
Comments can go here.

Play Message

Save & Close Cancel

Double click on an EVV log to access the Event Details area.

From here, you can view the basic Info tab, see the Electronic Signature sign off, check the Visit History, and view GPS information for the visit.

This information is not editable, but a Comment can be left on this page and saved.

Editing a Client – Billing



Rates Tab

The Rates tab is where an Agency can input rates that pertain to a specific client. These rates are pulled and set from a dropdown list of Charge Codes found in the Add dialogue.

To de-activate a rate, double click on an existing rate and un-check the Active box.

For information on how to setup Charge Codes and Rates, reference the CareWhen Foundations training.

Configuration Notes:

- If an existing Client rate exists, and the defaults are changed upon placing an Order, a “Rate Modified” alert will be displayed.
- This alert will give the option of updating the rate table to the new value for future uses.

Use the tool bar to edit and search for specific rates

Caregiver ID	Discipline	Effective Date	Chg Code	Description	Active	Caregiver Name	Charge Rates		Pay Rates	
							Hourly	Flat	Hourly	Flat
13	COM		37010	Companion Care...	✓	Apple, Annie	\$10.00	\$0.00	\$0.00	\$0.00
10	CNA						2.00	\$0.00	\$11.00	\$0.00
26	CNA						2.00	\$0.00	\$9.00	\$0.00
24	CNA						0.00	\$200.00	\$0.00	\$0.00
24	CNA						2.00	\$0.00	\$8.00	\$0.00

Displaying 1 - 5 of 5

Add New Rate

Caregiver*: Billings, Brenda (CNA)

Effective Date:

Skill Level: CNA

Charge Code*: 36010 - Homemaker Hourly

Charge Rates: Hourly: \$ 1.00 Flat:

Pay Rates: Hourly: \$ 0.50 Flat:

* required

Add Add & New Cancel

Editing a Client – Records



Notes Tab

The Notes tab provides an area to document changes and observations pertaining to a Client's account. New notes can be added at any time. This area is searchable via the search field beneath the options. See the *CareWhen Configuration* training for more information on setting up notes.

Common Action:

- Document common Client account updates, such as insurance information changes, Caregiver switches, and updated payment information.

Use the tool bar to edit, delete, or copy existing notes

Edit Client Record [Abigail Andrews]

Notes

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

No notes added.

Page 0

Add Note

Date:* 09/15/2020 Note Type:* Compliment

Subject:* Test Note for Client

Great job today!

16 characters of max 3000.

* required

Save & Close Cancel

Editing a Client – Records



Files Tab

The Files tab is where an Agency can upload and store required files for a Client's case. 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 Action:

- Upload time sheets or new policy agreements

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

Files

Search: Search file names:

File Name	Category	Description	Status	Created On	Uploaded ...	Downlo...	Actio...
No files found.							

Page 0 of 0

Upload File

Select file

Category:

Description:

Upload Cancel

Editing a Client – Records



History Tab

The History tab serves as an audit log for the Client's case. This serves as a running record for any changes that have been made by the Agency, and any alterations to a Client's record will create a new entry in the History tab. These entries can be filtered for easier lookup and cannot be edited.

Common Action:

- View log entries to review when payment information was updated.

Filter: Select field name... All Dates

Date ↓	Field Name	Old Value	
09/01/2020 10:00 AM	Update by Nelson, Alan GPS Latitude: GPS Longitude: IsLocOverride:	False	True
09/01/2020 09:39 AM	Update by Nelson, Alan Disable GPS Validation: Signature Capture:	true true	false false
08/24/2020 04:01 PM	Update by Nelson, Alan Familiar Caregivers:	Yadger, Hamid [CNA]	Fowler, John [CNA], Yadger, Hamid [CNA]