



## CareWhen Lite Training

### CareWhen Foundations



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.

# CareWhen Lite Feature Comparison

CareWhen Lite is a simplified version of CareWhen that offers basic EVV check-in functionality, Agency messaging, and scheduling functionality. To access the full feature set that CareWhen has to offer, inquire with your DWIHN administrator about upgrading.

	CareWhen Lite	CareWhen
Electronic Visit Verification (EVV)	✓	✓
Scheduling	Limited Functionality*	Full Functionality
Messaging	✓	✓
Non-DWIHN Insurance Claims	—	✓
Private Pay Invoicing	—	✓
Client and Caregiver Reminders	—	✓

# Feature Comparison cont.

## CareWhen Lite

## CareWhen

Late Visit Alerts	—	✓
Time Sheets	—	✓
Assessments	—	✓
Exports	—	✓
Billing and Management Reports	—	✓
Prospective Clients and Caregivers	—	✓
Data Tracking Home Tab	—	✓
Referral Tracking	—	✓

# Training Agenda: CareWhen Foundations



Most Agency settings pictured in this training will be pre-set and locked for DWIHN Agencies. Custom settings are available in the full version of CareWhen.

- To begin using CareWhen, we'll first go over three concepts that are critical to smooth onboarding and scheduling management:
  - Charge Codes
  - Skill Types
  - Skill Levels

# Charge Codes, Skill Types, Skill Levels and Rate IDs

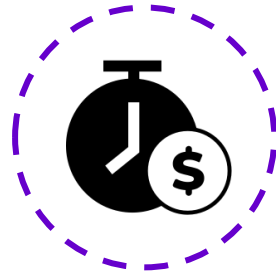
Using each of these concepts correctly is how you match a qualified caregiver to the client's required services and assign the appropriate bill rate for the care provided.



## Charge codes

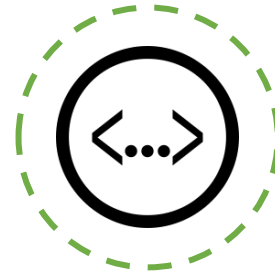
Default rate  
templates for each  
shift type

*(pay rate + Agency fee =  
charge rate; weekly)*



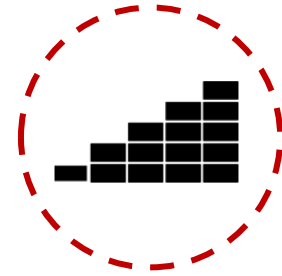
## Rates

Pay amounts for / from  
services that vary for  
each Caregiver-Client  
relationship



## Skill Types

Grouping of charge  
codes by caregiver  
qualification



## Skill Levels

Groupings or  
hierarchies of skill  
types

**Sharon**  
*Highly skilled  
Registered Nurse (RN)  
with 5 years of  
caregiver experience*



**Martha**  
*Needs wound care &  
assistance with IV  
antibiotics, plus  
feeding & continence*



**Gina**  
*Certified Nursing  
Assistant (CNA) who  
just started as a  
caregiver*



**Charlie**  
*Needs assistance with  
transferring, dressing,  
and toileting*



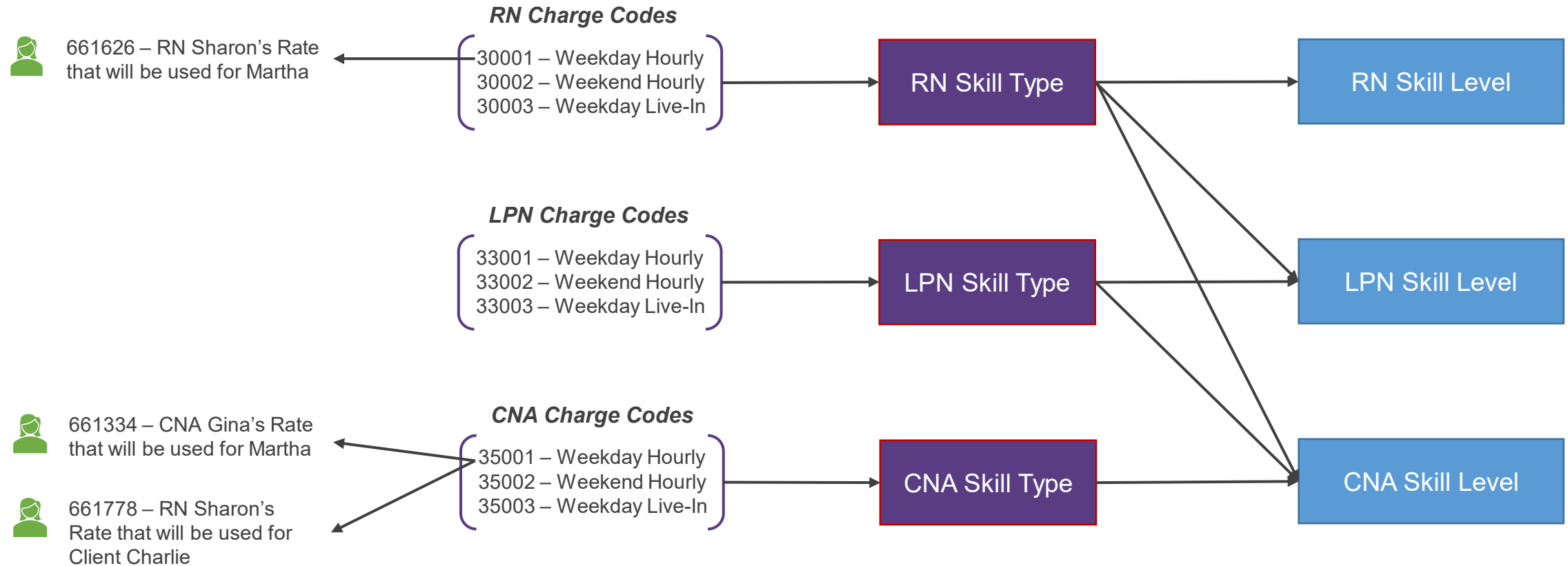
# How do charge codes, skill types, skill levels, and rates interact?

**Rates: Caregiver specific rates**

**Charge codes: Default rate templates for each shift type.  
Used to create visits**

**Skill types: Groupings of charge codes by caregiver qualification. Tie charge codes to skill levels.**

**Skill levels: Groupings or hierarchies of skill types. Assigned to caregivers**



# Charge Codes

**Charge Codes** are default rate templates and are grouped by Skill Types. Generally, Agencies have a code for each type of shift that the skill type might work or for each service they provide, such as hourly weekday, weekend hourly, flat (shift) rate, etc.

***Each charge code has two rates that are defined by the Agency:***



## Pay Rate

What the caregiver receives  
from the charge rate



## Charge Rate

The rate charged to the client.



# Charge Code Strategy & Number Scheme

For most Agencies, the preloaded charge codes will provide a solid start for building a full charge code menu. However, some Agencies will require additional or specialized charge codes.

Agencies should create a consistent numbering scheme for their charge codes.

- The first 3 digits are defined by the skill level (300 for RN, 330 for LPN, 350 for CNA, etc.)
- The 4<sup>th</sup> and 5<sup>th</sup> digit, 01-99, can be used by Agencies to denote what type of service is being provided.
- Codes that begin with 290 denote miscellaneous charges. These are not schedulable.

*All charge codes should be created before creating client orders (visits).*

The screenshot shows the CareWhen? software interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Maintenance (labeled with a red circle 1), Settings (labeled with a red circle 2), and Help. The left sidebar menu shows Agency Settings (Agency Info, Configuration, Zones, Client Types, Field Setup, Skill Levels, Skill Type, Text Messaging, Agency Logo) and Maintenance (Agency Tables, Charge Codes (labeled with a red circle 3), Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes, Note Types, Type Of Service). The main content area displays the 'Charge Codes' table with columns: Skill Type, Effective Date, Charge Code, and Description. The table contains the following data:

Skill Type	Effective Date	Charge Code	Description
Non Scheduled C...		29001	Mileage
Non Scheduled C...		29003	Errand Miles
LPN		33010	Skilled Nursing- SN
CNA		35002	Live In Day
CNA		35010	CNA Hourly
CNA		35011	CNA PC
HMK		36010	Homemaker Hourly
HMK		36011	Personal Care Hourly
CMP		37010	Companion Care Hourly

To view current charge codes, navigate to Charge Codes under Settings

# Adding a New Charge Code

**1** Settings

**2** Charge Codes

**3** Skill Type

**4** Settings

**5** Effective Date: 09/17/2020  
Skill Type: RN  
Charge Code: 30020  
Description: RN Weekend Hourly

**6** Charge Rates: Hourly: \$ 20.00 Flat:   
Pay Rates: Hourly: \$ 15.00 Flat:

**7** Flexible Scheduling

**8** Active

**10** Reimbursement Settings

**11** Overtime Eligible

**12** Save & Close

Select the Skill Type and enter a code within the range. Enter a description of the code.

Enter the charge rate (what the client pays) and the pay rate (what the caregiver receives). The pay rate must not be greater than the charge rate.

Check Flexible Scheduling if unscheduled visits are allowed to use this charge code and ensure that Active is checked.

If applicable, select a date for the Charge Code to become active

Delete the text from the Hourly field to edit the Flat rate field if needed

Check off whether this code is Overtime or Holiday Eligible and click Save & Close

# Edit a Charge Code

1 Settings

2 Charge Codes

3 LPN

4 Edit

5 Settings

6 Description: CNA Hourly

6 Charge Rates: Hourly: \$ 18.00 Flat:

6 Pay Rates: Hourly: \$ 9.00 Flat:

6 Flexible Scheduling

6 Active

6 \* required

6 Save & Close Cancel

7 Reimbursement Settings

8 Overtime Eligible Holiday Eligible

9 Save & Close Cancel

Check or un-check Overtime Eligible or Holiday Eligible if applicable and click Save and Close

To edit a charge code, click on the Edit icon after selecting a charge code from the list.

From here, you may edit the description or the rates, as well as enable / disable flexible scheduling.

Uncheck active if you would like to deactivate the charge code.

# Creating Rates for Client-Caregiver Relationships with Charge Codes

Charge codes provide default rate templates for a particular skill type and shift / service type.

These are used to pre-populate the charge and pay rates when creating a client-caregiver rate.

Standard rates can be left unchanged or adjusted.

Rates are created on the client record; each caregiver that works with a client must have a rate created for that client.

The rates will populate based on the charge code selected. Rates can be updated here if necessary.

To edit existing Client Rates, select a Rate and click Edit

1

2

3

Select the caregiver and charge code from the drop-down menus, and select an effective date if applicable. Update the rates if needed, ensure the rate is active, and click Save & Close.

The rates will populate based on the charge code selected. Rates can be updated here if necessary.

**Edit Client Record**

Care Plans Assessments Holds EVV Preauth **Rates** Message History Files

Search:

Caregiver	Discipli...	Effective Date	Chg Code	Descript...	Acti...	Caregiver Name
13						
10						
26						
24						
24						

**Add New Rate**

Caregiver\*: Apple, Annie (COM)

Effective Date: 09/18/2020

Skill Level: COM

Charge Code\*: 37010 - Companion Care Hourly

Charge Rates: Hourly: \$ 10.00 Flat:

Pay Rates: Hourly: \$ 0.00 Flat:

☒ Active

\* required

Save & Close Cancel

# Skill Types

Skill Types are groupings of charge codes by caregiver qualification.

- Skill Types cannot be changed or added to, however the alias can be renamed.
- When you create new charge codes for different skill types, the code must fall within the range listed (e.g. 30001-30099 for RN).
- The Non Scheduled Charges skill type is used for charges like mileage, etc.

Notices (0) Welcome ACB.EvanM@ AssuriCare! Tuesday, October 06, 2020, 1:04:34 PM

Home Scheduler Clients Caregivers Reports Tasks Maintenance **Settings** Help

Agency Settings

- Agency Info
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type**
- Text Messaging
- Agency Logo

Maintenance

- Agency Tables
- Charge Codes
- Payment Codes
- Adjustment Codes
- Education Codes
- Diagnosis Codes
- Note Types
- Type Of Service
- Discharge Reasons
- Document Categories
- GL Codes

### Skill Type

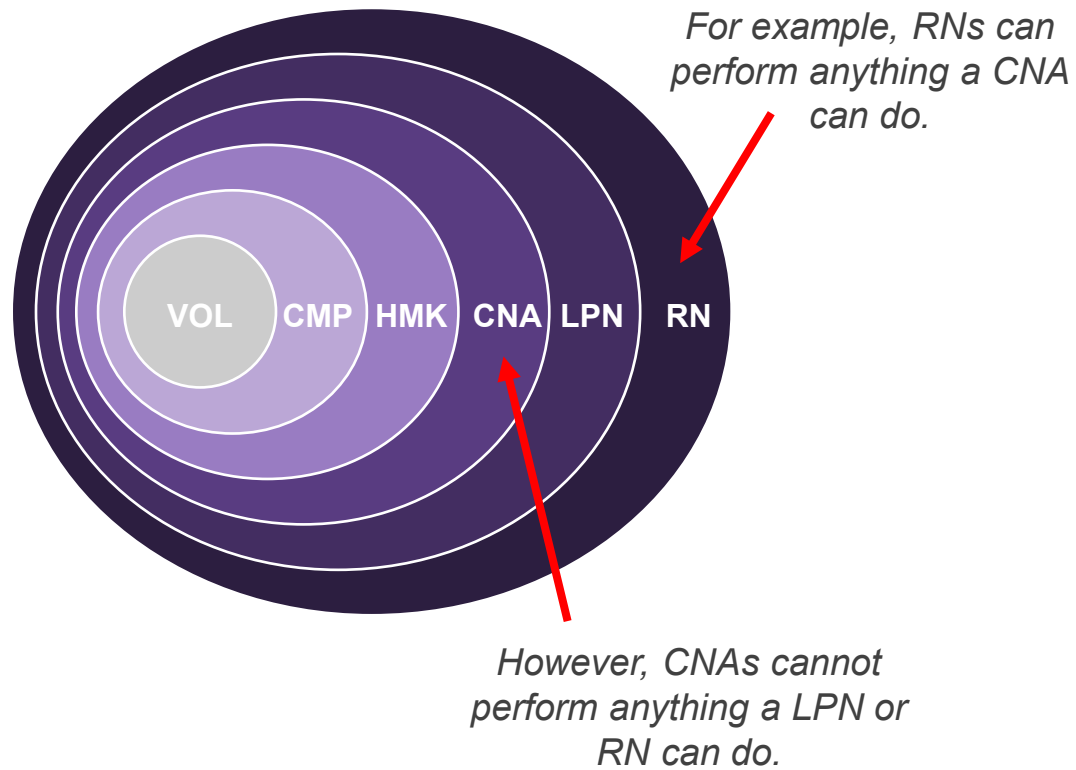
#...	Default Name (Code Range)	Alias
1	Non Scheduled Charges (29000 - 29999)	
2	Senior Nurse (30001 - 30099)	RN
3	Junior Nurse (33001 - 33099)	LPN
4	Senior Aide (35001 - 35099)	CNA
5	Junior Aide (36001 - 36099)	HMK
6	Companion (37001 - 37099)	CMP
7	Volunteer (38001 - 38099)	VOL
8	Physical Therapist (40001 - 40099)	PT
9	Occupational Therapist (41001 - 41099)	OT
10	Speech Therapist (42001 - 42099)	ST
11	Medical Social Services (43001 - 43099)	MSW
12	Specialist 1 (44001 - 44099)	
13	Physical Therapy Aide (45001 - 45099)	PTA
14	Occupational Therapy Aide (46001 - 46099)	OTA
15	Specialist 2 (47001 - 47099)	
16	Bachelor of Social Work (50001 - 50099)	BSW

Skill Types are not customizable. However, by double clicking the Alias field, they can be renamed.

# Skill Levels

Skill Levels are groupings or hierarchies of skill types, which represent different caregiver qualifications. Skill Levels are used to indicate the level of services that a caregiver can perform and ensure that caregivers with the correct qualifications are assigned to provide the care needed.

Each skill is qualified to perform successively more tasks



In this case, since Martha needs a higher level of care, only an RN could provide the care she needs. However, since Charlie does not need the same level, both Sharon and Gina could provide care for Charlie.



Sharon  
RN Skill Level



Gina  
CNA Skill Level



Martha  
Needs wound care and IV antibiotics



Charlie  
Needs assistance with transferring, dressing, and toileting



# Skill Levels

CareWhen comes with standard skill levels that can be customized

Priority	Skill Level Name*	Skill Type(s) Assigned*	Actions
1	RN	RN+LPN+CNA+HMK+CMP+VOL	
2	LPN	LPN+CNA+HMK+CMP+VOL	
3	CNA	CNA+HMK+CMP+VOL	
4	HMK	HMK+CMP+VOL	
5	CMP	CMP+VOL	
6	VOL	VOL	
7	PT	PT	
8	OT	OT	
9	ST	ST	
10	MSW	MSW	
11	PTA	PT+PTA	
12	OTA	OT+OTA	
13	BSW	BSW	
14	SP1	Specialist 1	
15	SP2	Specialist 2	
16	OFF		

*Skill levels can be customized to include or remove different skill types. For example, if multiple skills levels may perform the same duties, each of those skill levels should have the same skill types assigned.*

Skill levels are assigned on the Private tab of the Caregiver Record

Edit Caregiver Record : Apple, Annie [COM]

1 Private | Scheduling | Agency | Time Sheets | Reimbursement | Unavailable | Photo

Hire Date:\* 02/19/2019

Birth Date:\* 05/14/1985 Age: 35

Gender:\* ☐ Male ☒ Female ☐ Not Specified

Social Security:\* 222-44-6666

EIN:

Skill Level:\* COM 2

Marital Status: ☐ Single ☐ Married

Payroll Number:

Termination Date:

Termination Reason:

Ethnic Origin:

Can Drive: ☐

\* required read only

3 Save | Save & Close | Cancel

# Adding and Editing Skill Levels

CareWhen?

Home Scheduler Clients Settings 1

Agency Settings  
Agency Info  
Configuration  
Zones  
Client Types  
Field Setup  
Skill Levels 2  
Skill Type  
Text Messaging  
Agency Logo  
Maintenance  
Agency Tables

To edit a Skill Level, select the skill level from the table and click the Edit button

3

4

Drag & Drop to prioritize skill levels.

Priority	Skill Level Name*	Skill Type(s) Assigned*	Actions
1	CNA	CNA+HMK+CMP+VOL	
2	COM	CMP	

**Add Skill Level**

Name (max 4 chars): RN

Can Perform Skill Types:

<input checked="" type="checkbox"/> RN	<input checked="" type="checkbox"/> LPN	<input checked="" type="checkbox"/> CNA
<input checked="" type="checkbox"/> HMK	<input checked="" type="checkbox"/> CMP	<input checked="" type="checkbox"/> VOL
<input type="checkbox"/> PT	<input type="checkbox"/> OT	<input type="checkbox"/> ST
<input type="checkbox"/> MSW	<input type="checkbox"/> Specialist 1	<input type="checkbox"/> PTA
<input type="checkbox"/> OTA	<input type="checkbox"/> Specialist 2	<input type="checkbox"/> BSW

Ok Cancel

To add a Skill Level, click the Add icon. Give the Skill Level a 1-4 letter name and select the skill types the level can perform. Click OK to save.



# 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 CareWhen? Agency Tables interface. The left sidebar contains a tree view with categories like Agency Settings, Maintenance, and Agency Tables. The 'Skills' table is highlighted in the 'Agency Tables' section. The table has columns for 'Description' and 'Active'. A red box highlights the 'Add' icon (a green plus sign) and the 'Check Mark' icon (a red X). A red box also highlights the 'Skills' table in the sidebar. A red box highlights the 'Add Skills' button in the top right corner of the table. A red box highlights the 'Skills' table in the sidebar. A red box highlights the 'Add Skills' button in the top right corner of the table. A red box highlights the 'Skills' table in the sidebar. A red box highlights the 'Add Skills' button in the top right corner of the table.

Tip: Drag & Drop to reorder.

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

Add Skills by clicking the Add icon any typing the skill name in the new line. Click the Check Mark to add the skill.

The screenshot shows the 'Edit Caregiver Record : Apple, Annie [COM]' form. The 'Scheduling' tab is selected. The form includes fields for 'Zone' (North, South, West), 'Desired Hours Per Week' (30), and 'Skills'. The 'Skills' section has checkboxes for 'Check All', 'Diabetic Care', 'Lifting', 'Cats', 'Dogs', 'Live-In', 'Dementia Care', 'Hoyer Lift', and 'Smokes Inside'. The 'Scheduling' tab is highlighted in red.

The screenshot shows the 'Edit Client Record [Abigail Andrews]' form. The 'Scheduling' tab is selected. The form includes fields for 'Zone' (North), 'Primary Caregiver' (Glynn, Derek), and 'Needs'. The 'Needs' section has checkboxes for 'Check All', 'Diabetic Care', 'Lifting', 'Cats', 'Dogs', 'Live-In', 'Dementia Care', 'Hoyer Lift', and 'Smokes Inside'. The 'Scheduling' tab is highlighted in red.

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

# A Note about “Skills”

*You can enable the warning for Skills v. Needs mismatch on the Configuration Tab under Settings*

*The warning will show creating the visit. It will not prevent scheduling – the scheduler can click yes to finish scheduling or no to assign a different caregiver*

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Home Scheduler Clients Caregivers Reports Tasks Maintenance Settings Help

Agency Settings

- Agency Info
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging
- Agency Logo

Maintenance

- Agency Tables
- Charge Codes
- Payment Codes

Configuration

- Agency Configuration
- Client Configuration
- Order Configuration

Time Zone: (UTC-06:00) Central Time (US & Canada)

Auto Client ID: ☒ Enabled

Auto Caregiver ID: ☒ Enabled

Term for Client: Client

Term for Staff: Caregiver

Term for Visit: Visit

Disable Needs vs Skills: ☐

If unchecked, this will ensure that warnings are displayed if a Caregiver does not have a skill the Client needs.

Validation Errors

Your new Order has validation problems listed below:

Click to display date(s) conflicted

+ i Caregiver does not have the Client need of [Diabetic Care]

If warnings are enabled, a pop up appears if a visit is scheduled with a Caregiver that does not have the skill(s) that the client needs.  
*\*This will not prevent scheduling the visit\**

Yes No Cancel