CareWhen Training

Reports

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 Reports

This training will provide an overview of Reports functionality within CareWhen and include spotlights on some of the more common reports. An Agency may use reports to assess various aspects of their activity within CareWhen.

Reports offer customizable summaries of most functionality in CareWhen that can be generated and downloaded. There are currently seven Report categories available:

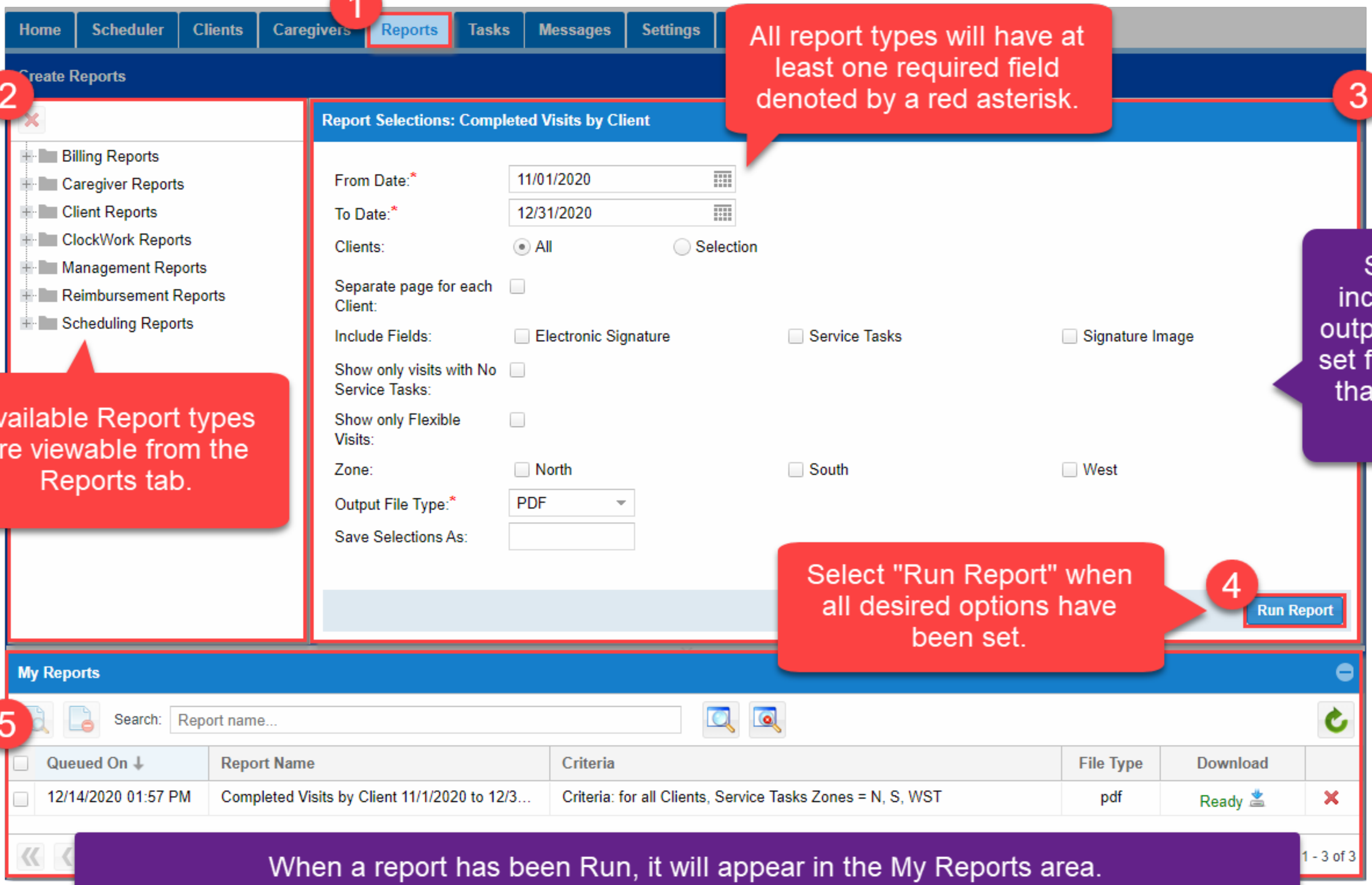
- **Billing Reports:** View summaries of approved transactions, open invoices, and more.
- **Client Reports:** Access available information on all Clients being serviced through CareWhen.
- **Caregiver Reports:** Access available information on Agency Caregivers in CareWhen.
- **Scheduling Reports:** Used to view information on completed visits, cancelled visits, schedule information, and more.
- **ClockWork Reports:** View summaries of all telephonic and mobile EVV activity in CareWhen.
- **Management Reports:** Access Revenue reports for services rendered to Clients.
- **Reimbursement Reports:** View detailed summaries of Caregiver reimbursement due during pay periods.

CareWhen Reports – Running a Report

Reports are generated and accessed from the **Reports** tab in CareWhen.

A user may generate a report from this page by expanding the folder for the desired report category, selecting the desired report type, picking report options, and clicking “Run Report”.

Once a report has been run, it will display under the My Reports area of the tab.



All report types will have at least one required field denoted by a red asterisk.

Available Report types are viewable from the Reports tab.

Selections, inclusions, and output options are set for each report that you wish to generate.

Select "Run Report" when all desired options have been set.

When a report has been Run, it will appear in the My Reports area.

A "Processing" status will appear under the Download column and will be replaced with a "Ready" status once it's complete. Reports that have been processed can be searched for, downloaded, and deleted from this area.

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CareWhen Reports – Report Criteria

All reports within CareWhen are generated using three types of criteria. The contents of these criteria will vary based on the function of the report.

Selections: Used to select and filter reporting information to be generated. These include options such as “To and From” dates, “Zones”. *If no selections are made from a list,* ***all*** *selections will be added to the report.*

Inclusions: Used to add optional data to the report being generated, such as “Special Skills” and specific data fields. Inclusions may be selected individually or by a “Check All” box. Unlike Selections, not making any selections will leave all options out of the report.

Output Options: Used to toggle formatting options when a report is generated, as well as selecting the output file type between PDF or Excel document.

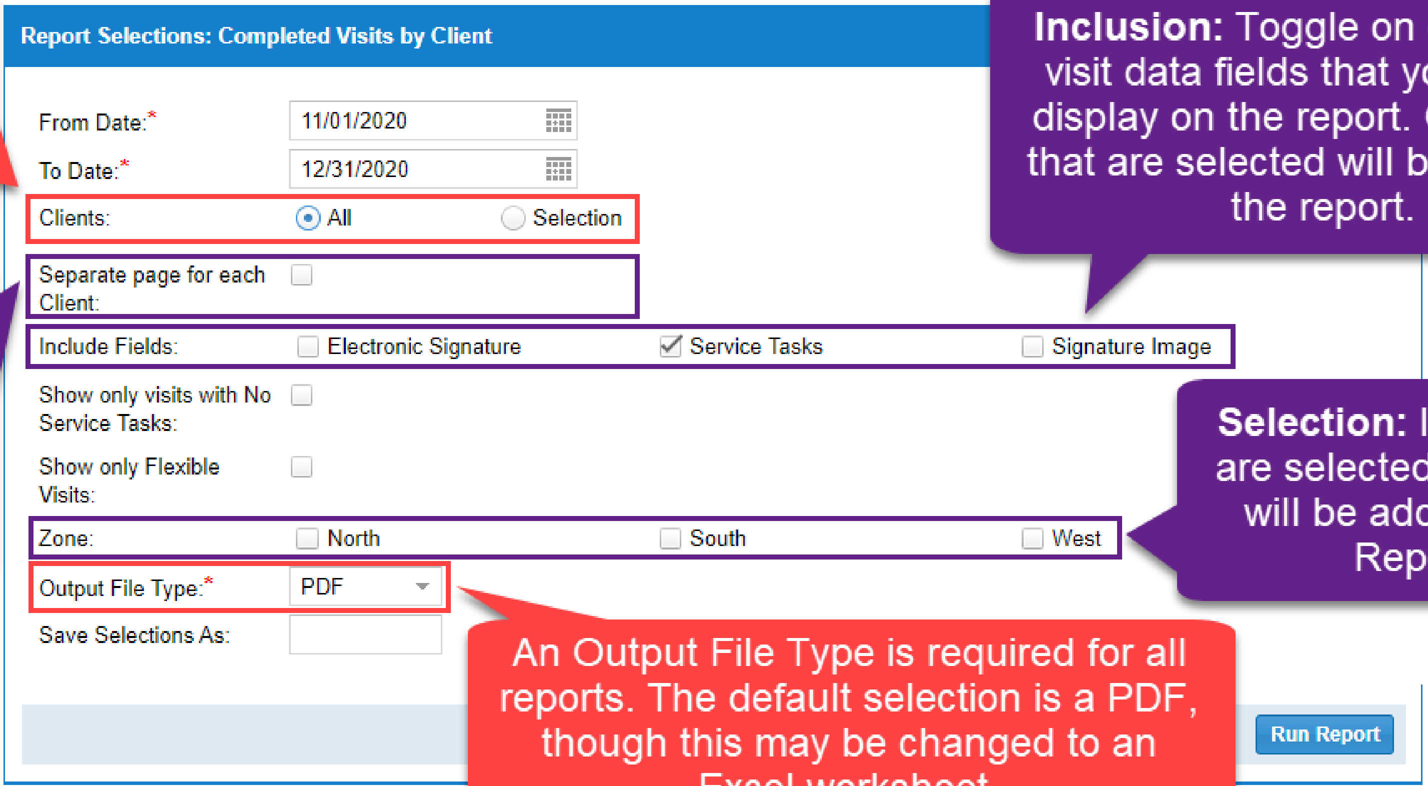
Continue with this training to view examples of specific reports that have been showcased for their frequency of use and representation of various report criteria.

Completed Visits by Client

- The most generated report type in CareWhen, Completed Visits by Client is used to view all completed visits in a selected time frame, organized by specific selection of clients (or all clients), and filtered by Zone selections.

Run a report for all clients in CareWhen, or make individual selections.

Output Option: Toggle Report formating to separate each Client summary to a different page of the Report.



Inclusion: Toggle on completed visit data fields that you wish to display on the report. Only fields that are selected will be added to the report.

Selection: If no Zones are selected, all Zones will be added to the Report.

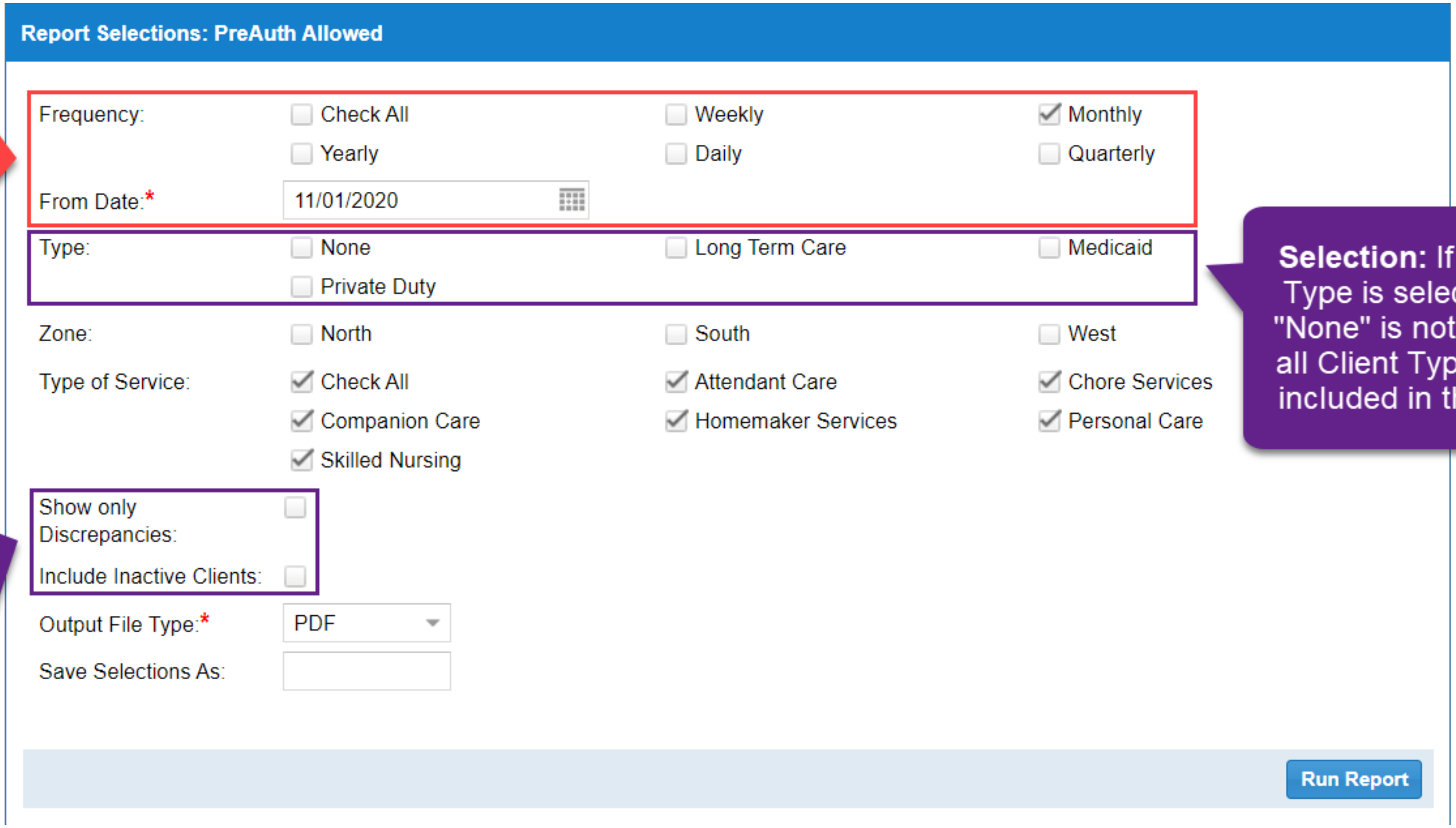
An Output File Type is required for all reports. The default selection is a PDF, though this may be changed to an Excel worksheet.

Report Spotlight: “PreAuth Allowed”

PreAuth Allowed

- A frequently run Client Report that is used to display pre-authorized time allotted to Clients by their Insurance Companies, including a remaining balance of time, if applicable, and the discrepancy between allowed and scheduled time.

If no PreAuth Frequency is selected, a required "From" and "To" date range selector will appear.



Selection: If no Client Type is selected, and "None" is not checked, all Client Types will be included in the report.

Output Option: Choose to display Inactive Client, if desired, and select to display PreAuth values with discrepancies between Allowed and Scheduled time only.

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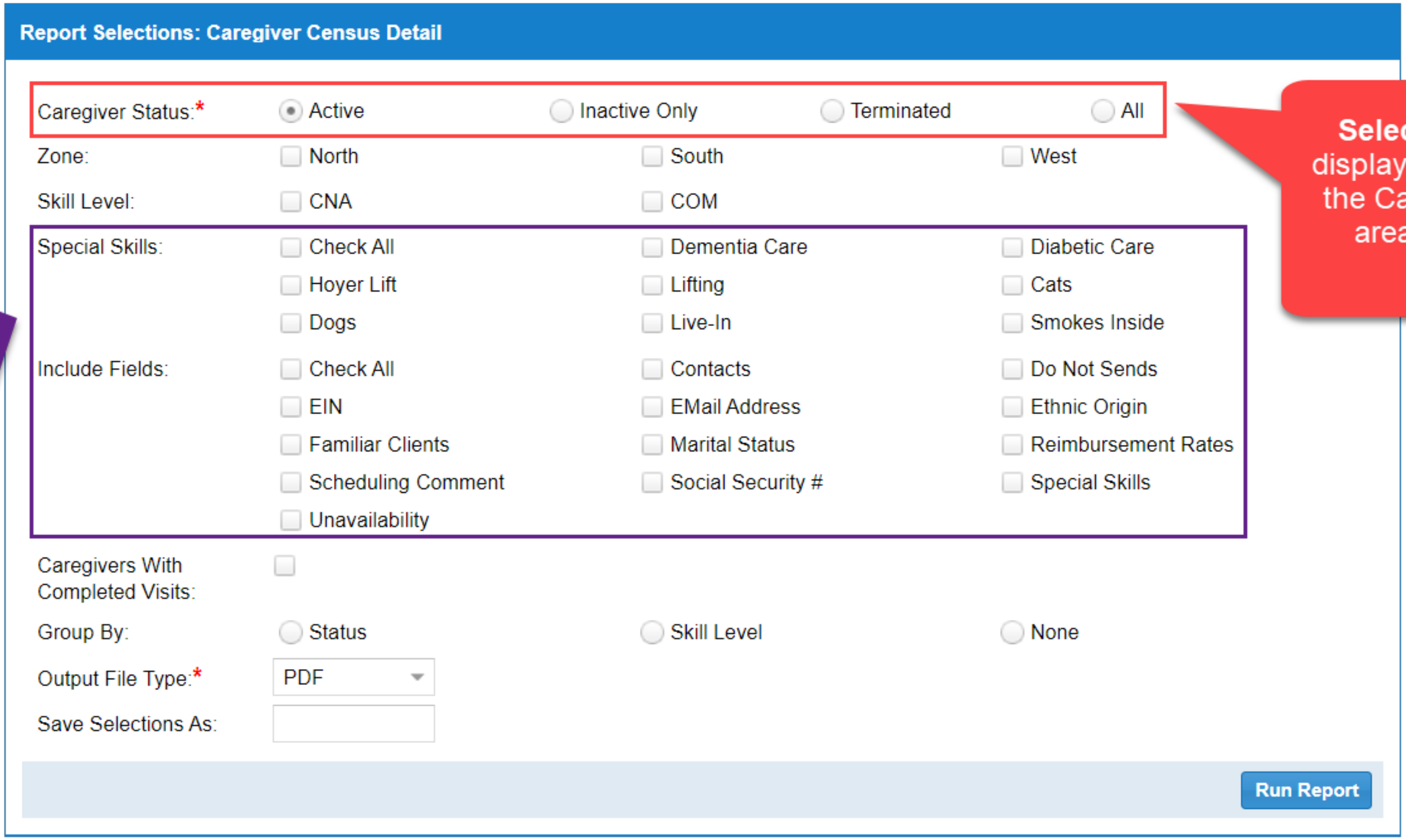
Report Spotlight: “PreAuth Allowed”

Caregiver Census Detail

- A general information report used to identify Caregivers that meet the Report criteria. Select from a long list of Skills and general information fields to include.

Inclusion: Choose what Special Skills and information fields to include from the Caregivers in CareWhen.



Selection: Filter Caregivers displayed in the report by using the Caregiver Status selection area. Active is the default selection.

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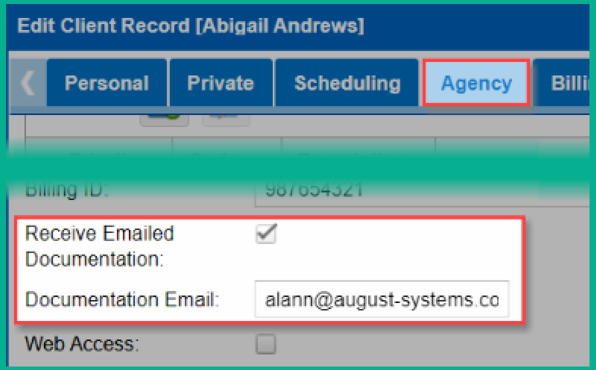
Report Spotlight: “Client Schedule”

Client Schedule

- A summary report detailing visits that meet the Report criteria. This can include completed visits and can be set to generate a separate report for each Client.

If a Client has "Receive Emailed Documentation" enabled from their Agency tab, and an email specified for "Documentation Email", the "Email Report" toggle will send the client-specific schedule report directly to the email address on file


Edit Client Record [Abigail Andrews]

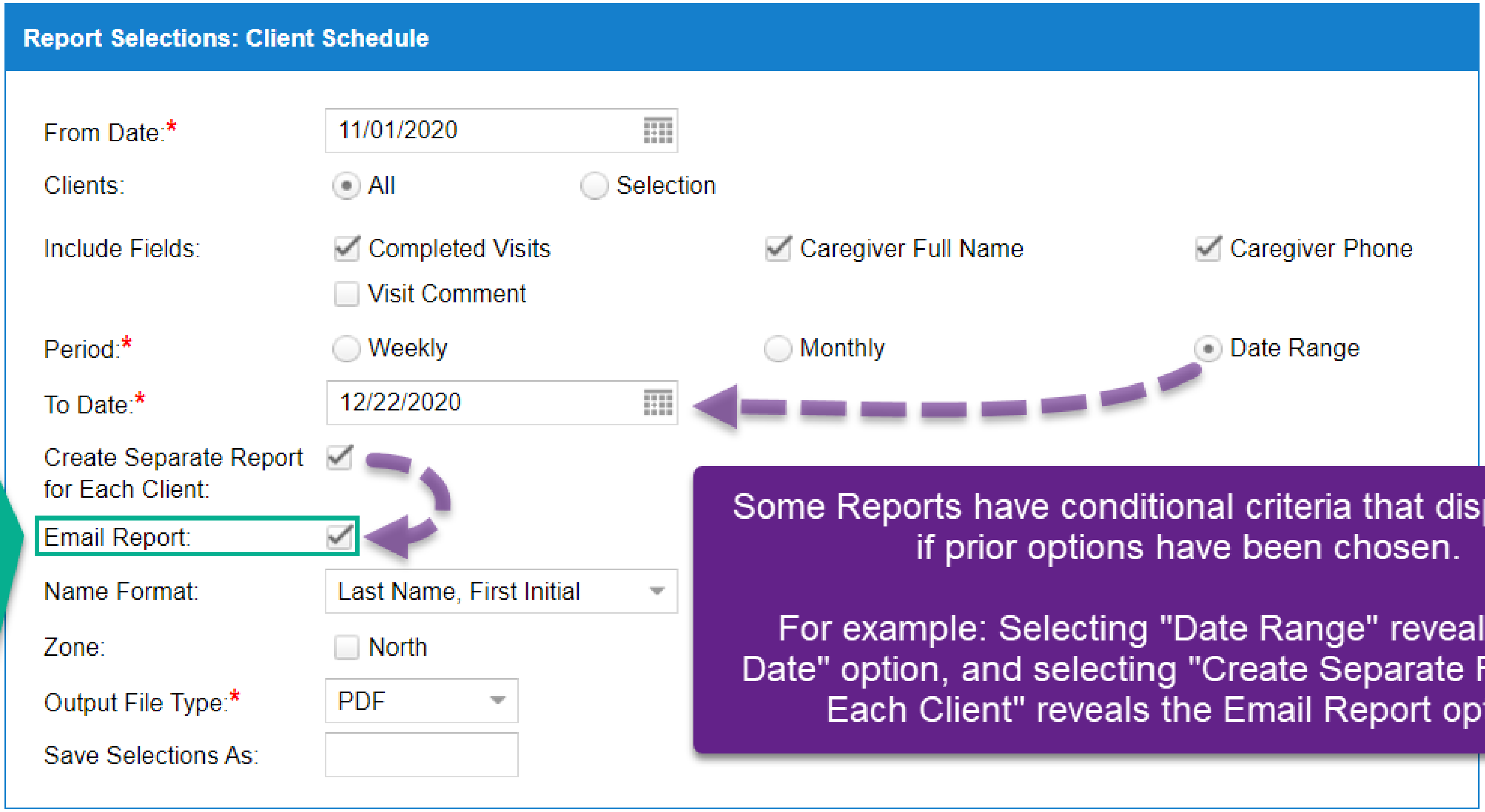
Personal | Private | Scheduling | Agency | Billi

Billing ID: 987654321

Receive Emailed Documentation: ✓

Documentation Email: alann@august-systems.co

Web Access:


Report Selections: Client Schedule

From Date:* 11/01/2020

Clients: All | Selection

Include Fields: ✓ Completed Visits | ✓ Caregiver Full Name | ✓ Caregiver Phone | Visit Comment

Period:* Weekly | Monthly | Date Range

To Date:* 12/22/2020

Create Separate Report for Each Client: ✓

Email Report: ✓

Name Format: Last Name, First Initial

Zone: North

Output File Type:* PDF

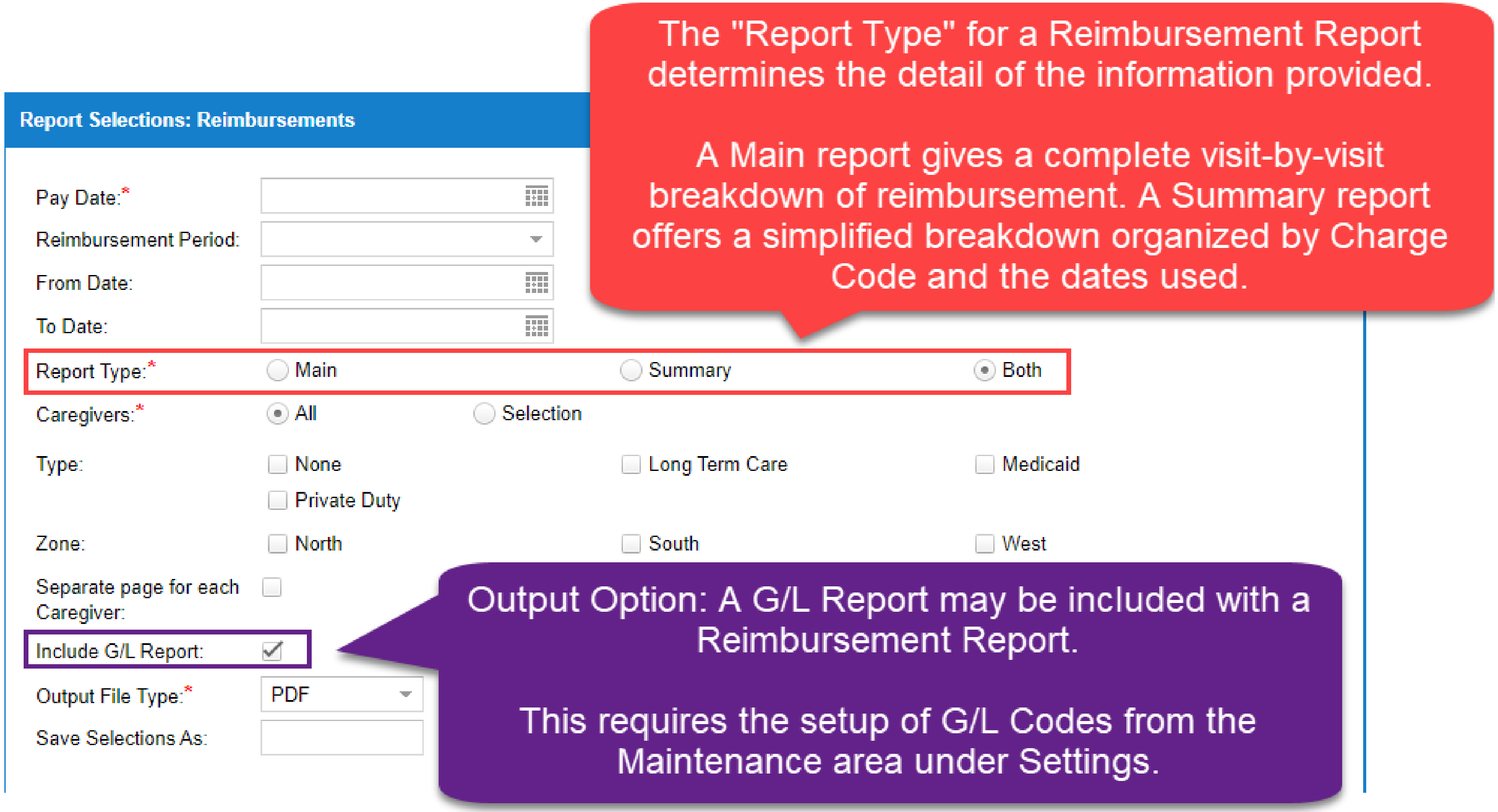
Save Selections As:

Some Reports have conditional criteria that displays only if prior options have been chosen.

For example: Selecting "Date Range" reveals a "To Date" option, and selecting "Create Separate Report for Each Client" reveals the Email Report option.

Reimbursements

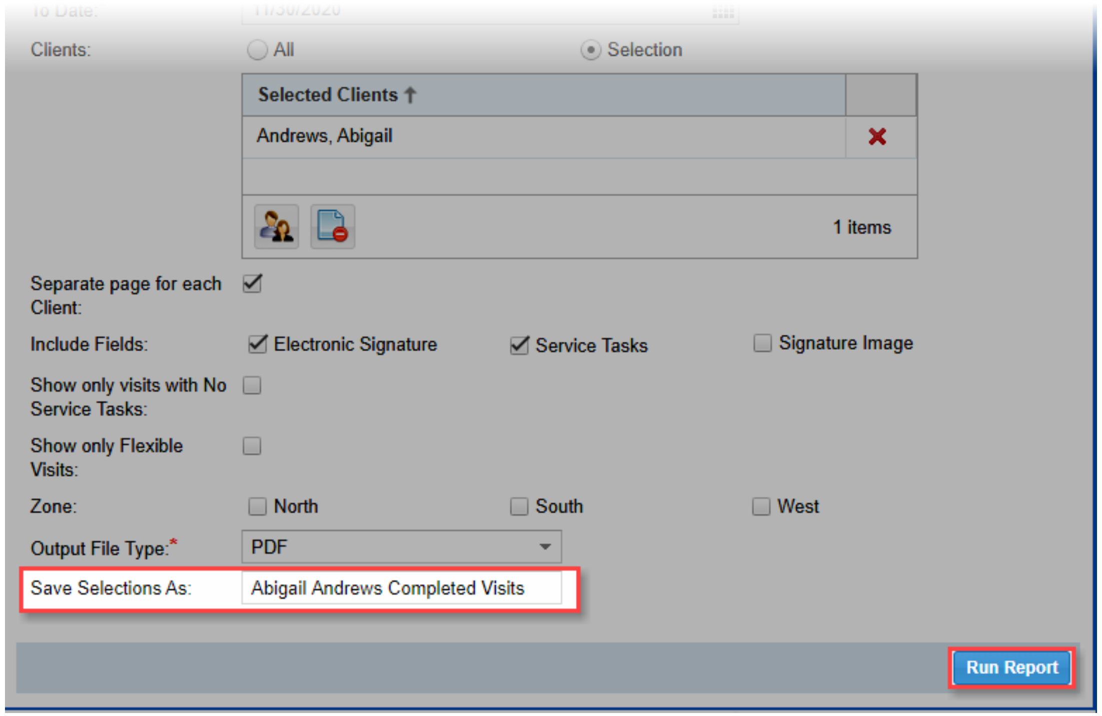
- Used to generate a summary of all payment reimbursements to be made to Caregivers in a pay period. This report is often used for payroll purposes.
- ***Note:*** *Options present on the Reimbursement Reports page are determined by Agency-specific Reimbursement settings that have been established from the Settings area. Options available here will vary between Agencies.*



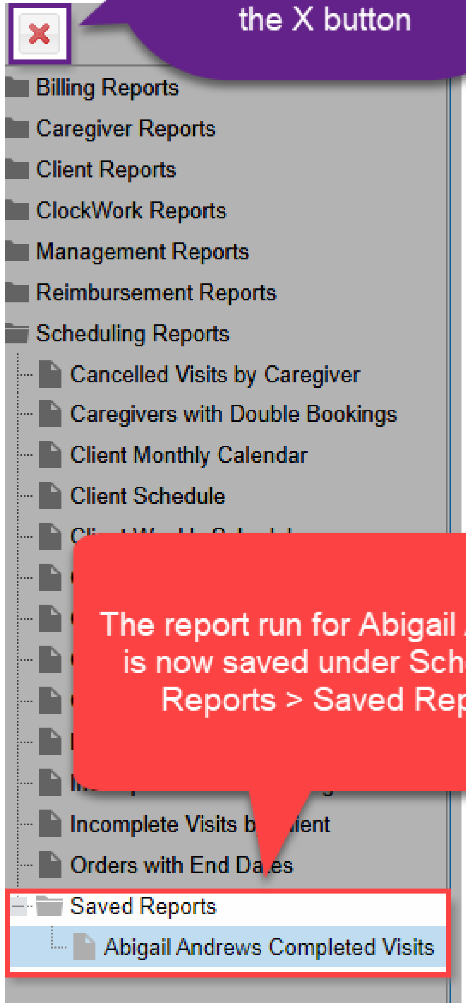
CareWhen Reports – Saved Reports

Many reports offer the option to save your current report selections for faster use in the future.

When the option is available, it will appear at the bottom of the report options area and ask for a name to be used for the current set of report options.



Delete selected Saved Reports by selecting the report and clicking the X button



The report run for Abigail Andrews is now saved under Scheduling Reports > Saved Reports

Once a report has been generated with a “Save Selections” title entered, a sub-folder will appear under the report category containing a custom version of the report type with the previously used options automatically selected.