



CareWhen Training

Training Overview



Foundational Concepts



Agency
Configuration



Adding and
Editing
Caregivers

Adding and
Editing
Clients



Scheduling

\$ Billing Setup

Invoicing
and Claims

Payment
Tasks



Foundational Concepts

CareWhen Foundations

- Learn the core elements of CareWhen, including:
 - Charge Codes
 - Rates
 - 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



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CareWhen Foundations



Agency Configuration

CareWhen Configuration

- Set system defaults and menu dropdowns
- Configure communications settings
- Manage System Users
- Establish Clockwork / EVV Settings

CareWhen Settings Configuration

Before importing or adding clients and caregivers in CareWhen, selecting your settings and configuration preferences are crucial to the smooth operation of CareWhen for your business.

System
Defaults

Menu
Dropdowns

Communication
Setup

User
Management

Clockwork /
EVV Setup



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Adding and Managing Caregivers

How do I Onboard, Edit, and Offboard Caregivers?

Adding & Inactivating Caregivers

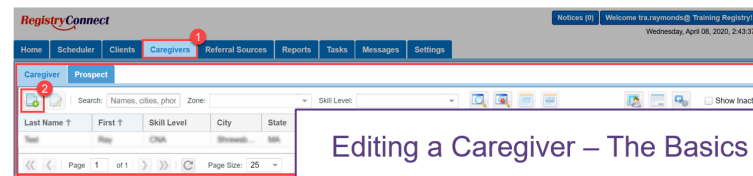
- Input Personal, Private, Agency, and Schedule info
- Indicate Skills and Familiar Clients
- Add Prospective Caregivers
- Inactivate a Caregiver

Editing Caregivers

- Edit all Personal, Private, Agency, and Contact info
- Edit Scheduling information
- Log Notes and Reminders
- Upload files

Adding a Caregiver – Getting Started

Adding a Caregiver in RegistryConnect can be accomplished in a few simple steps. Start by selecting the Caregivers tab. Once selected, click on the Add button.





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Adding & Inactivating Caregivers


Editing a Caregiver – The Basics

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

**Edit Information**
Update personal and private info
Manage contacts

**Scheduling**
Add Caregiver Skills and Familiar Clients
Set Unavailability

**Billing**
Manage employment / payment info

**Records**
Set reminders
Add notes
Manage time sheets
View Caregiver record history

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Editing Caregivers



Adding and Managing Clients

How Do I Onboard, Edit, and Offboard Clients and create and manage visits?

Adding & Inactivating Clients

- Input Personal, Private, Agency, and Schedule info
- Add Prospective Clients
- Inactivate a Client

Editing Clients

- Edit Personal, Private, Agency, and Contact info
- Schedule Order
- Manage Billing info if applicable
- Log Notes and Reminders
- Upload files

Creating & Managing Visits

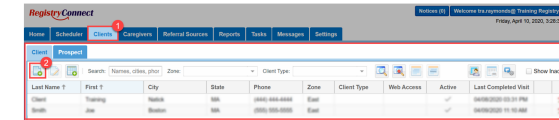
- Creating Visits
- Assigning Caregivers
- Edit Visits
- Find Available Caregivers



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Adding a Client – Getting Started

Adding a Client in RegistryConnect can be accomplished in a few simple steps. Start by selecting the Client tab. Once selected, click on the Plus button.



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Editing Clients

Editing a Client – The Basics

Once a Client has been added to RegistryConnect, 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

Billing

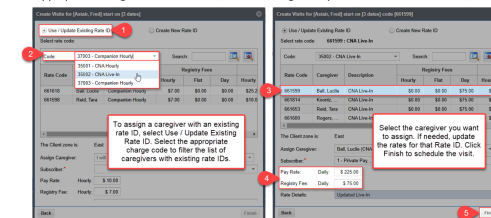
Set rates
Add and update payment info

Records

Set reminders
Add notes
Manage documents

Creating Client Visits

To assign a caregiver to the visit that already has a rate ID for that client, select Use / Update Existing Rate ID. Select the appropriate charge code and then select the caregiver. Update the rates if needed and click Finish.



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Adding & Inactivating Clients

Creating & Managing Visits



Billing and Payments

If applicable to my Agency, how do I establish billing settings, work with Payees and Subscribers, and execute payment tasks?

Billing Setup

- Create Charge Codes
- Add Payors and Insurance Companies
- Add Client Subscribers

Invoice and Claims

- Learn the basics of Invoices and Claims
- Establish Payor-specific Invoice and Claims settings

Payment Tasks

- Learn the Payment Process
- Execute Approvals
- Generate Invoices and Claims
- Add Payments

CareWhen Billing Setup – Overview

Setup of billing options within CareWhen involves touching on three primary settings areas. When establishing these settings, setup should occur in the following order:

Charge Codes: Used to create default rate templates specific to different types of care that will be required for billing. Custom charge codes may be set on a client level and an insurance company level.

Payors: Used to establish parties responsible for payment for a given set of services. Payors can include entities such as Medicaid, Private Insurers, and VA.

Insurance Companies: Used to add insurance providers that will display under Billing settings for each Client.

Charge Codes

Payors

Insurance Companies

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Invoices and Claims

CareWhen – Invoices

Invoices are bills generated within CareWhen, that are sent directly to a Client or applicable Responsible Party.

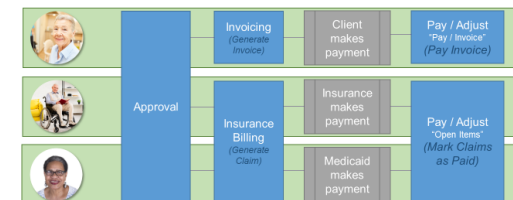
Invoices documents may be downloaded from CareWhen and mailed to the recipient or emailed directly.

Note: Private Pay is the most used instance of invoice-based billing, but invoices may be generated for any Payor marked as "Can Invoice" during Payor setup.

Billing Setup

CareWhen Payment Process

To illustrate the use of Payment "Tasks", see below for a map of how certain tabs would be used to process billing for each of our Client examples.



Payment Tasks

