CareWhen Training

Training Overview

Foundational Concepts

Agency Configuration

Adding and Editing Caregivers

Adding and Editing Clients

Scheduling

$ Billing Setup

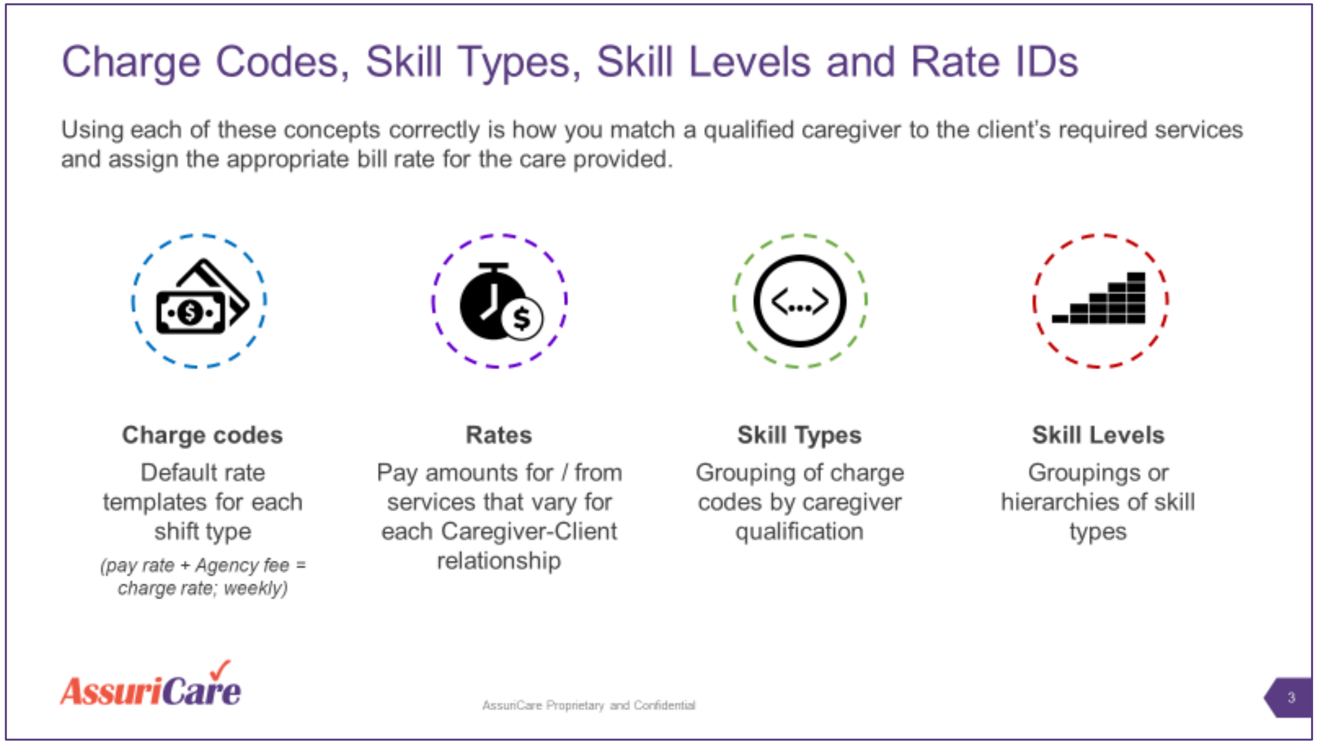
Invoicing and Claims

Payment Tasks

Foundational Concepts

CareWhen Foundations

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

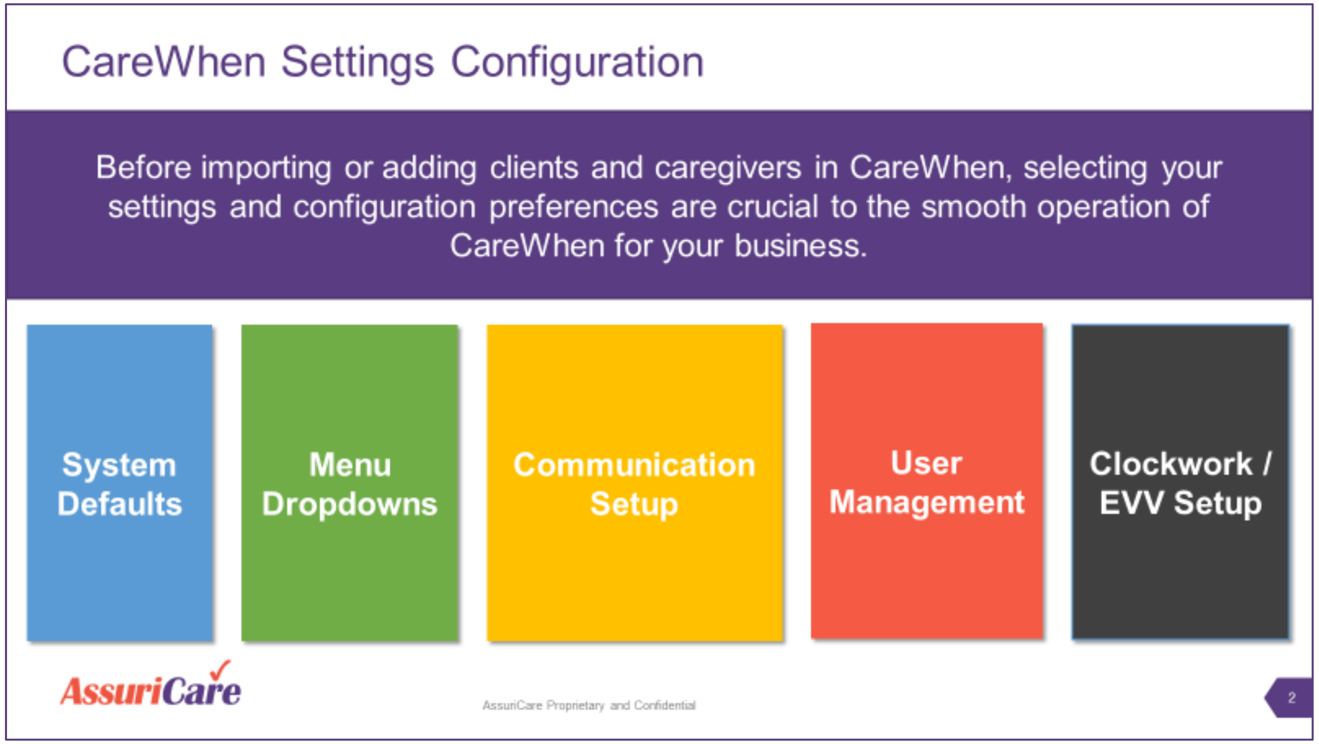


CareWhen Foundations

Agency Configuration

CareWhen Configuration

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



CareWhen Configuration

Adding and Managing Caregivers

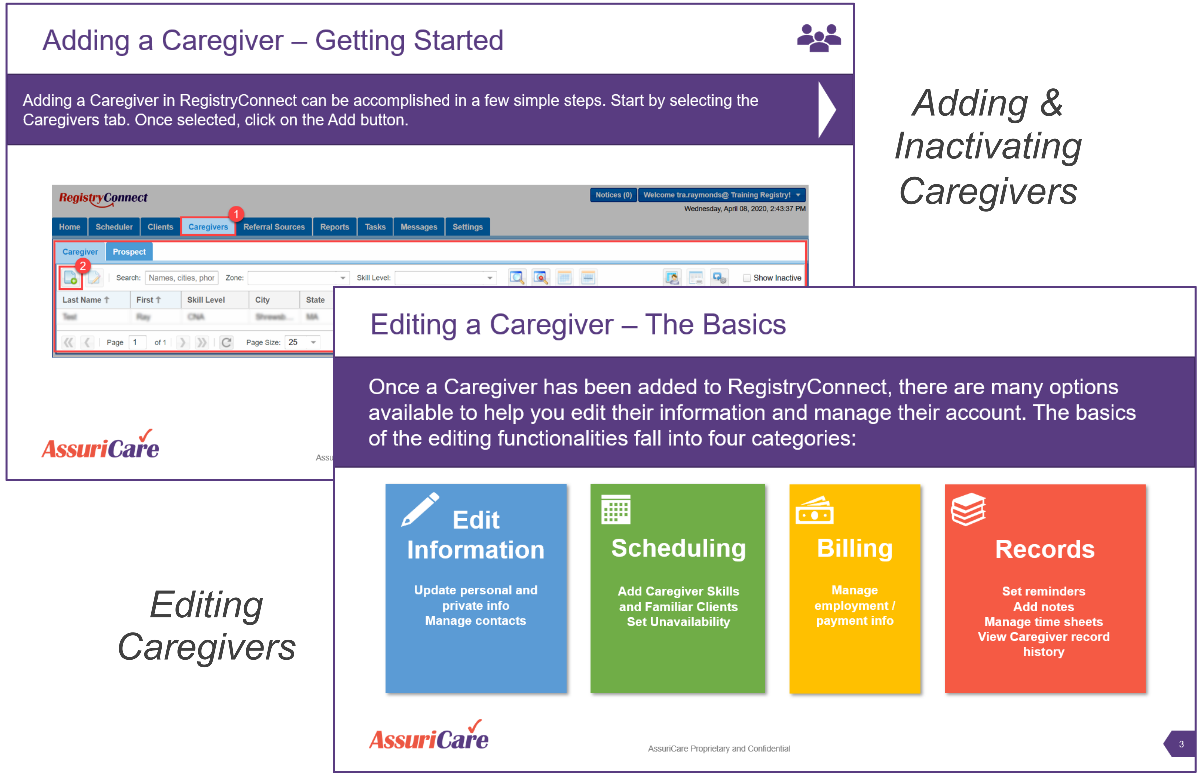
How do I Onboard, Edit, and Offboard Caregivers?

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 & Inactivating Caregivers

Editing Caregivers

Adding and Managing Clients

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

Adding & Inactivating Clients

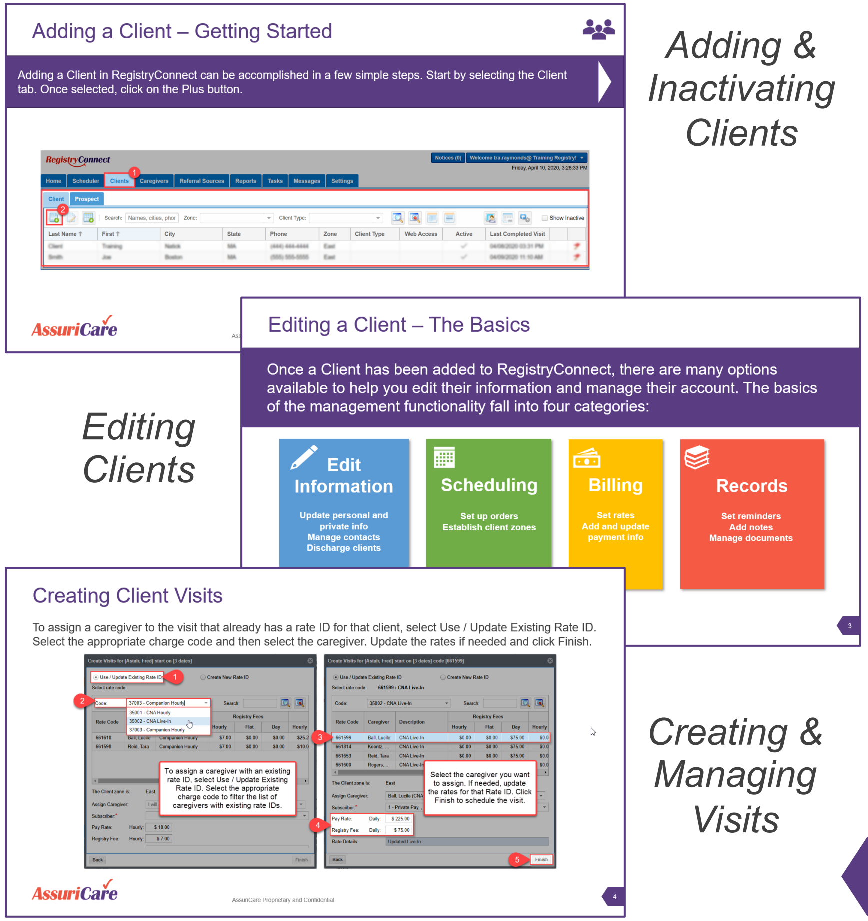
- Input Personal, Private, Agency, and Schedule info
- Add Prospective Clients
- Inactivate a Client

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



Adding & Inactivating Clients

Editing 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

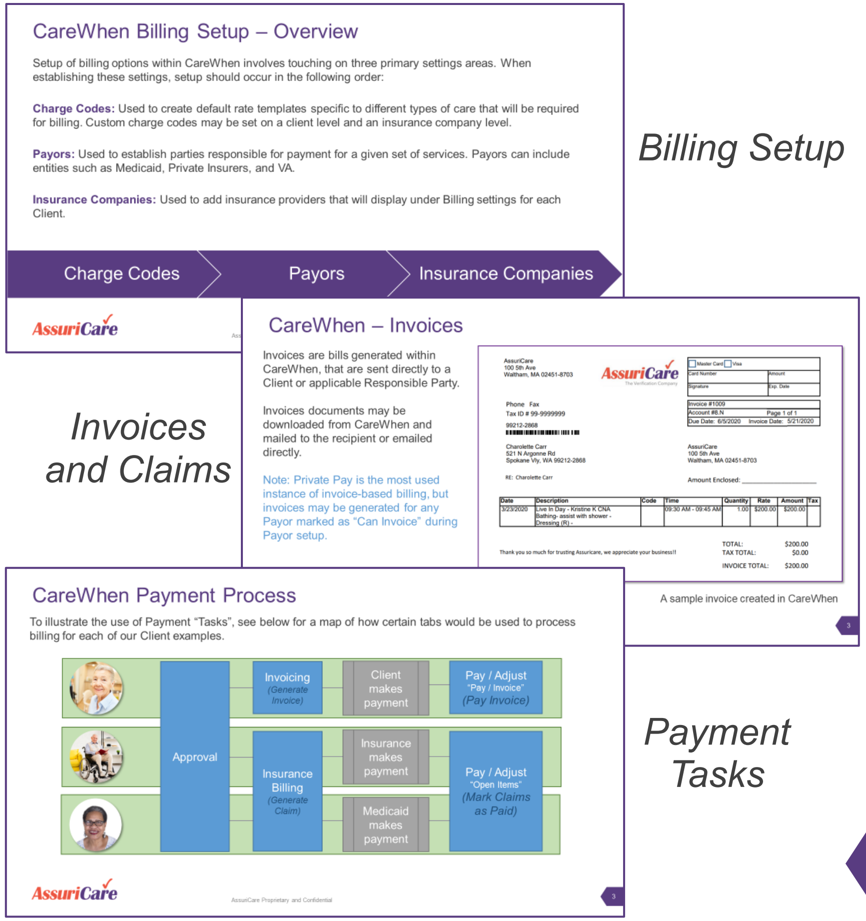
- Create Charge Codes
- Add Payors and Insurance Companies
- Add Client Subscribers

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



Billing Setup

Invoices and Claims

Payment Tasks