

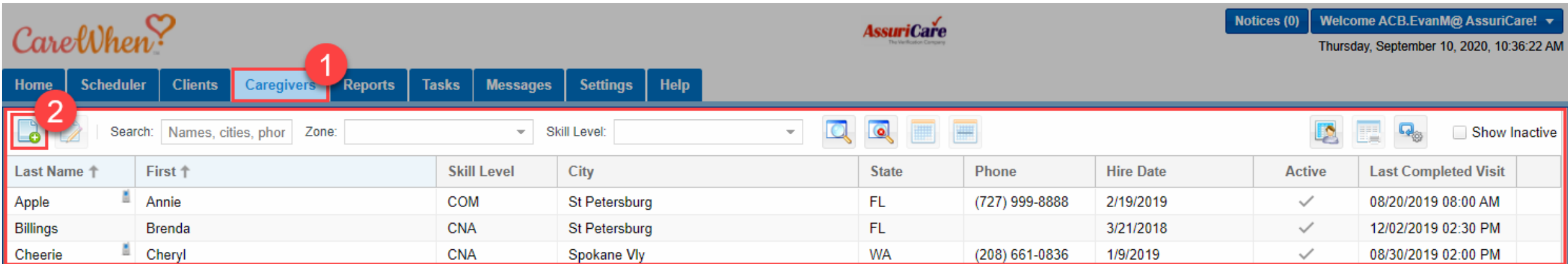


CareWhen Training

Adding & Inactivating Caregivers

Adding a Caregiver – Getting Started

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

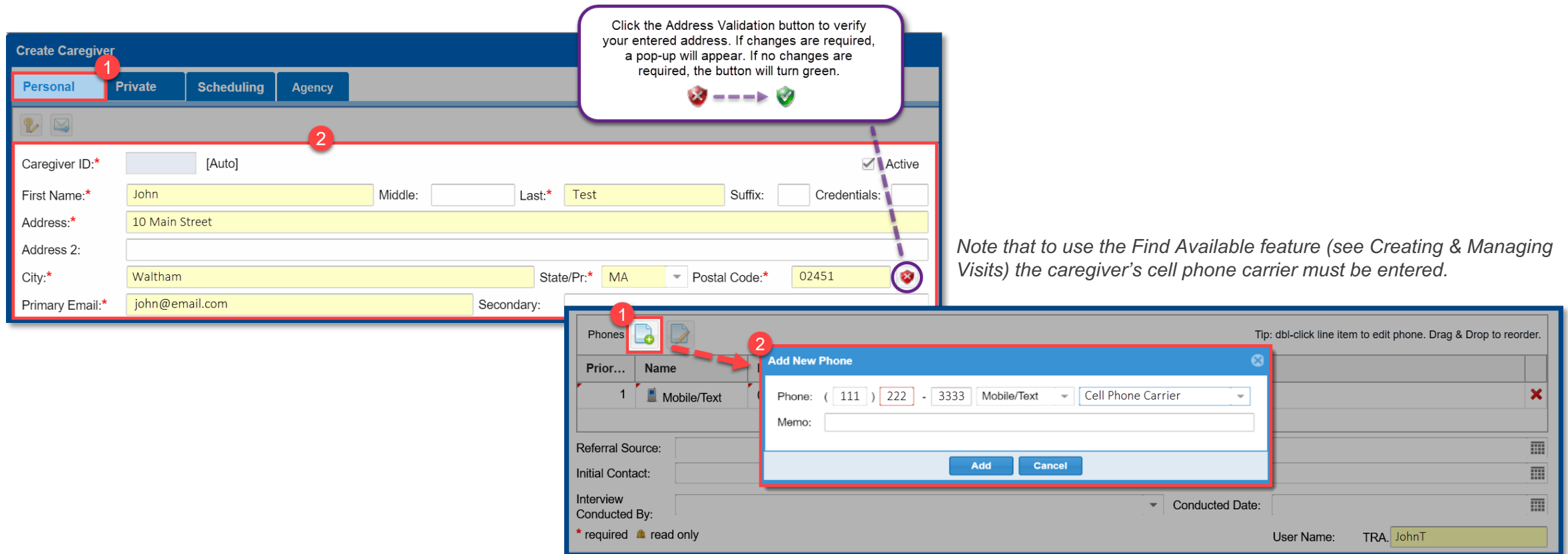


The screenshot shows the CareWhen web application interface. The top navigation bar includes the CareWhen logo, AssuriCare logo, and a user welcome message: "Welcome ACB.EvanM@ AssuriCare!". The main navigation menu has tabs for Home, Scheduler, Clients, Caregivers (highlighted with a red box and a red circle containing the number 1), Reports, Tasks, Messages, Settings, and Help. Below the navigation menu is a search bar with a search icon (highlighted with a red box and a red circle containing the number 2), a search input field containing "Names, cities, phor", and dropdown menus for "Zone:" and "Skill Level:". To the right of the search bar are icons for a magnifying glass, a calendar, and a list. A "Show Inactive" checkbox is also present. Below the search bar is a table of caregivers with the following columns: Last Name ↑, First ↑, Skill Level, City, State, Phone, Hire Date, Active, and Last Completed Visit.

Last Name ↑	First ↑	Skill Level	City	State	Phone	Hire Date	Active	Last Completed Visit
Apple	Annie	COM	St Petersburg	FL	(727) 999-8888	2/19/2019	✓	08/20/2019 08:00 AM
Billings	Brenda	CNA	St Petersburg	FL		3/21/2018	✓	12/02/2019 02:30 PM
Cheerie	Cheryl	CNA	Spokane Vly	WA	(208) 661-0836	1/9/2019	✓	08/30/2019 02:00 PM

Adding a Caregiver – Personal Information

Start with the Personal tab. Here you enter general information for the Caregiver. Items that are required for this step are marked with red stars. To add phone numbers to a Caregiver, select the Plus button, input their complete phone information and click Add.



Click 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.

Note that to use the Find Available feature (see Creating & Managing Visits) the caregiver's cell phone carrier must be entered.

Form Fields:

- Caregiver ID: [Auto] Active
- First Name: John Middle: [] Last: Test Suffix: [] Credentials: []
- Address: 10 Main Street
- Address 2: []
- City: Waltham State/Pr: MA Postal Code: 02451
- Primary Email: john@email.com Secondary: []

Phones Table:

Prior...	Name
1	Mobile/Text

Add New Phone Dialog:

Phone: (111) 222 - 3333 Mobile/Text Cell Phone Carrier

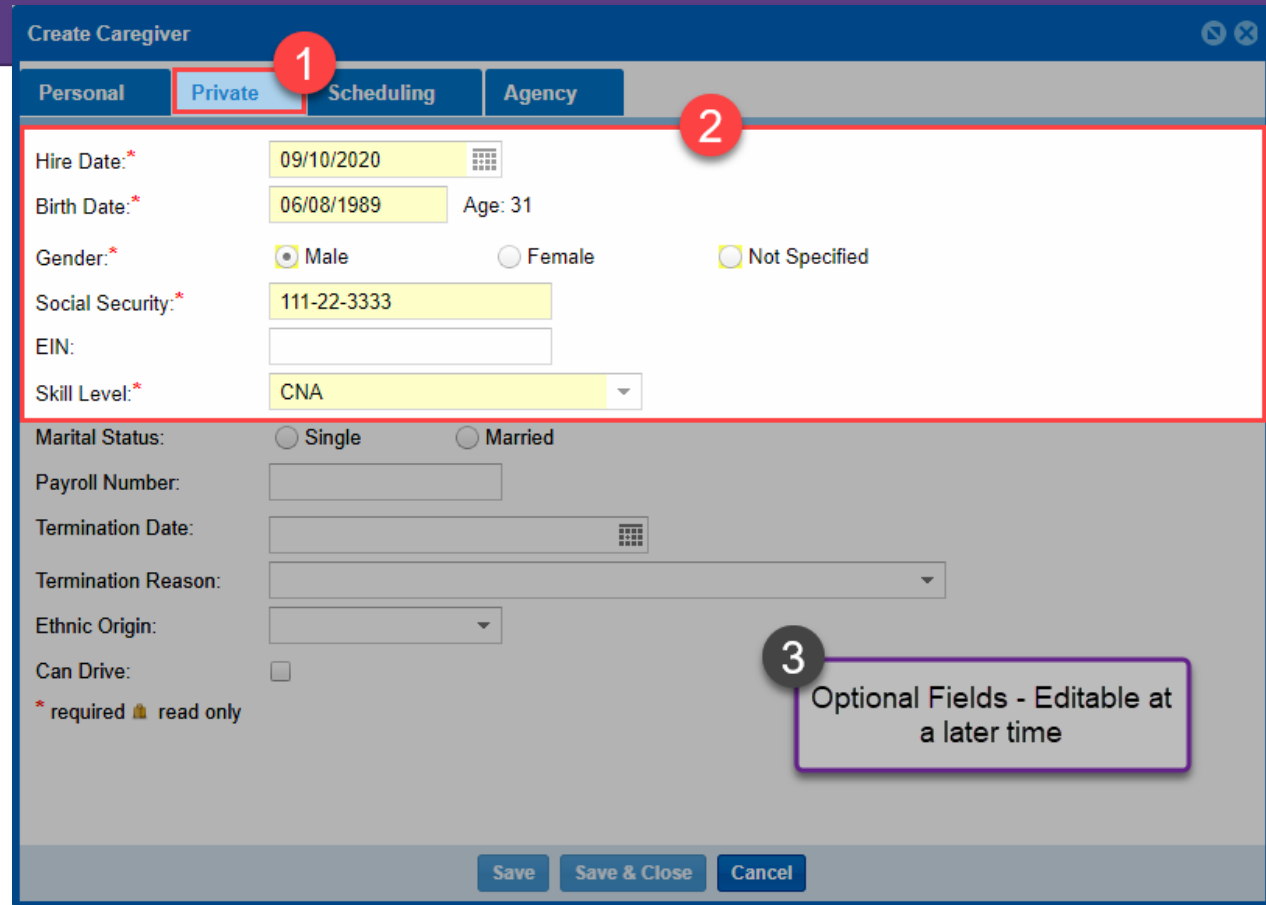
Memo: []

Buttons: Add Cancel

Adding a Caregiver – Private Information

The second tab is the Private tab. Here, input all required information, as well as any available optional information.

- The skill level that the caregiver is assigned will determine what type of visits they can be assigned. See the *CareWhen Foundations* training for more information on skill levels.



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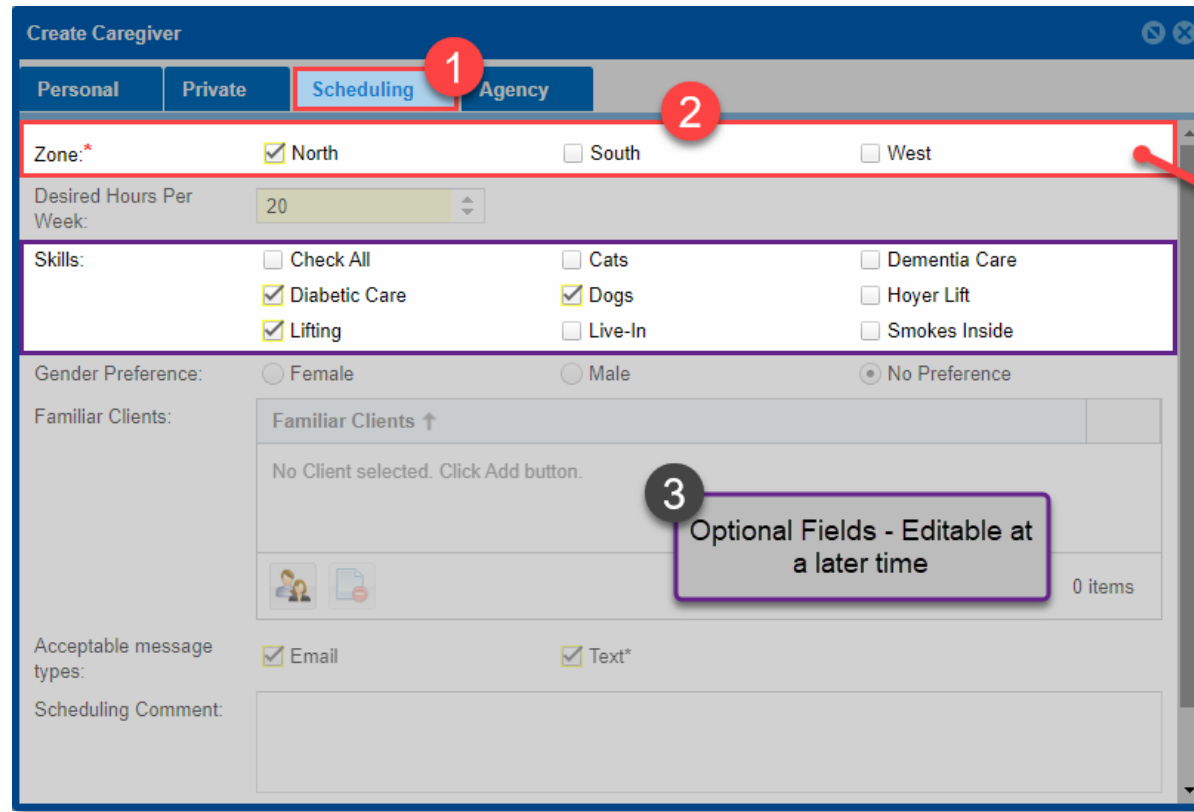
3

Optional Fields - Editable at a later time

Adding a Caregiver – Scheduling Information

From the Scheduling tab, you must select the Caregiver's service Zone(s). Caregivers can be assigned to multiple zones. You may then enter in any available optional information.

- Associate the Caregiver with whichever Zones they will be servicing.
- The skills on the Scheduling tab will be used to match the caregiver up with the Client's Needs. If the caregiver does not have a particular client need, a warning will generate when assigning the visit (if enabled).



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Optional Fields - Editable at a later time

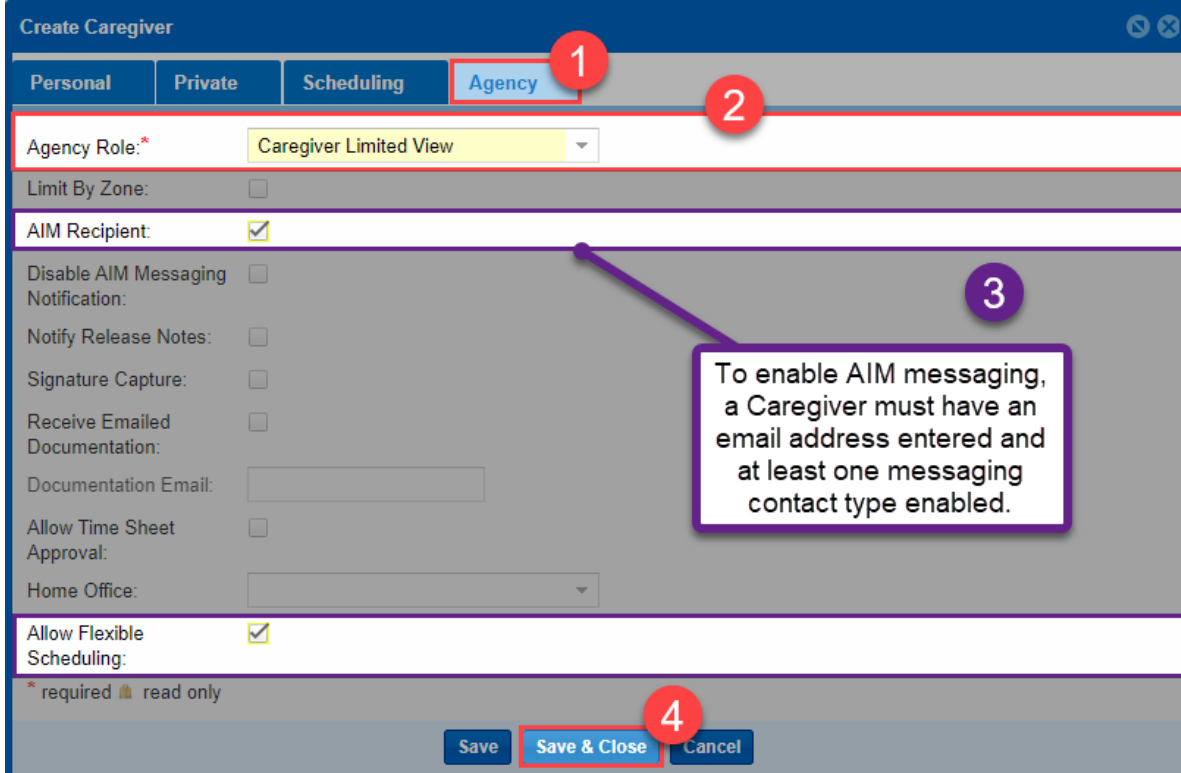
Zones are used to identify regions or office locations. Clients are associated to a single Zone, but Caregivers can be assigned to multiple Zones for which they are available to service.

Adding a Caregiver – Agency Information

Finally, the Agency tab will be presented as the last tab to edit. Agency Role is required and should be left on the default Caregiver Limited View. Click Save and Close to complete adding the caregiver.



- Unless a Caregiver works in the agency requiring elevated CareWhen privileges, their Agency Role must be selected as Caregiver Limited View.
- The Allow Flexible Scheduling option must be checked to allow Caregivers to complete visits in the system.
- Toggle AIM Recipient on to grant the Caregiver access to Agency Internal Messaging.



Create Caregiver

Personal Private Scheduling **Agency** 1

Agency Role:* Caregiver Limited View 2

Limit By Zone:

AIM Recipient: 3

Disable AIM Messaging Notification:

Notify Release Notes:

Signature Capture:


Receive Emailed Documentation:

Documentation Email:

Allow Time Sheet Approval:

Home Office:

Allow Flexible Scheduling: 4

* required  read only

Save Save & Close Cancel

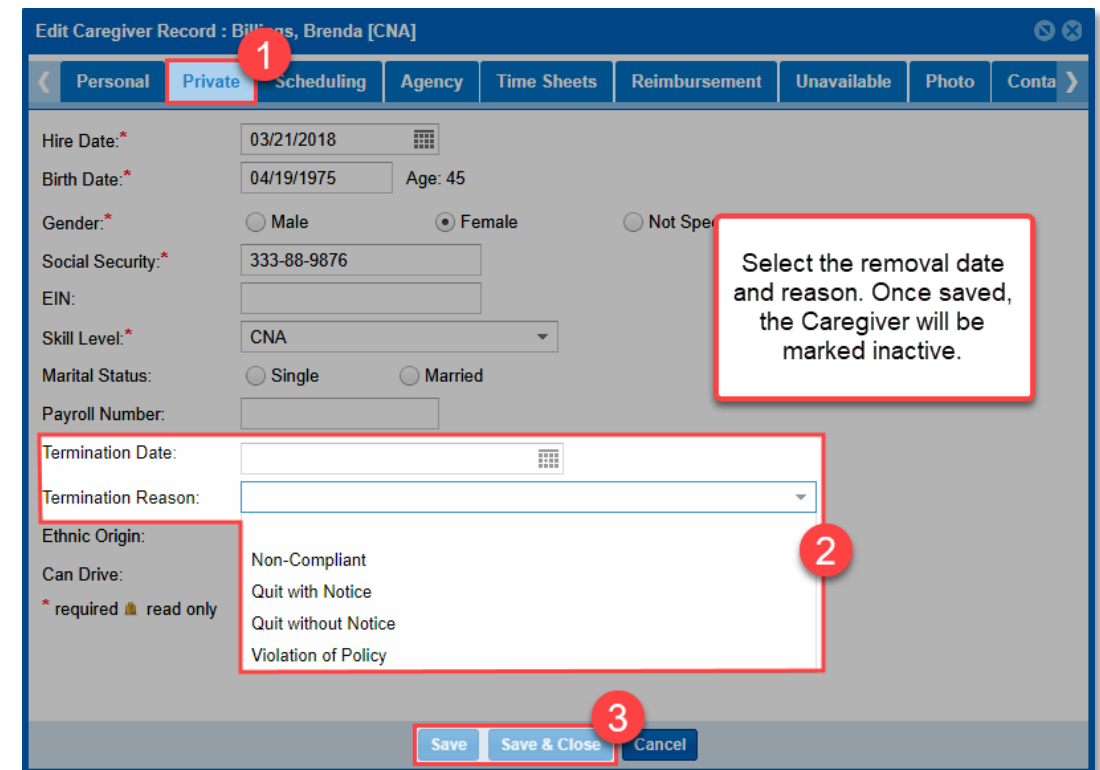
To enable AIM messaging, a Caregiver must have an email address entered and at least one messaging contact type enabled.

Inactivating a Caregiver

Inactivating a Caregiver in CareWhen is straightforward as well. Simply click into the caregiver and then select the removal date and reason on the Private tab.

Once inactivated:

- Any future visits that were assigned to the caregiver will show as unassigned
- The caregiver will not be able to check in or out using the mobile app
- When looking at caregiver reports, you can elect to include inactive caregivers or exclude them



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Select the removal date and reason. Once saved, the Caregiver will be marked inactive.

Creating Caregiver Prospects



CareWhen gives you the ability to enter and track prospective caregivers. To add a prospective caregiver, click on the Add Icon under the Prospects tab.

With caregiver prospects you can track:

- Contact information
- Referral sources
- Prospective caregiver skills
- Additional demographic and scheduling information

Converting Caregiver Prospects to Active



When you are ready to convert a caregiver prospect to active, simply open the Prospective Caregiver record and click Convert to Active.

- When you convert the caregiver, CareWhen will prompt you to enter any required information before allowing conversion. For example:
 - Full Address
 - Email
 - Skill Level
 - Social Security Number / EIN
- Once converted you will be able to assign the caregiver to visits

Home Scheduler Clients Caregivers Tasks Messages Settings Help

Caregiver Prospect

Names, cities, phor Zone: Skill Level:

Last Name ↑ First ↑

Prospect Evan

Edit Caregiver Prospect Record [Prospect, Evan]

Personal Private Scheduling Agency Contacts Notes Compliance Files History

Caregiver ID: 28 [Auto]

First Name: * Evan Preferred: Middle: Last: Prospect Suffix: Credentials:

Address:

Address 2:

City: State/Pr: Postal Code:

Primary Email:

Phones

Prior...	Name	Number	Memo
No phones found.			

Referral Source: Referral Date:

Initial Contact: Contact Date:

Interview Conducted By: Conducted Date:

* required read only

Convert to Active Save Save & Close Cancel

To convert to an active Caregiver, edit the Prospective Caregiver record and click Convert to Active. You will be prompted to enter any missing required information before the conversion completes.