CareWhen Training

Editing Caregivers

Editing a Caregiver – The Basics

The slides in this presentation will show the editable fields found on each tab, and spotlight user's common editing actions. At any point in the management process, you may click the "Close", "Save", or "Save and Close" buttons at the bottom of the screen.

To learn how to set up the dropdown options for caregiver tab fields, see the CareWhen Configuration training.

Editing a Caregiver – The Basics

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

Edit Information

Update personal and private info
Manage contacts

Scheduling

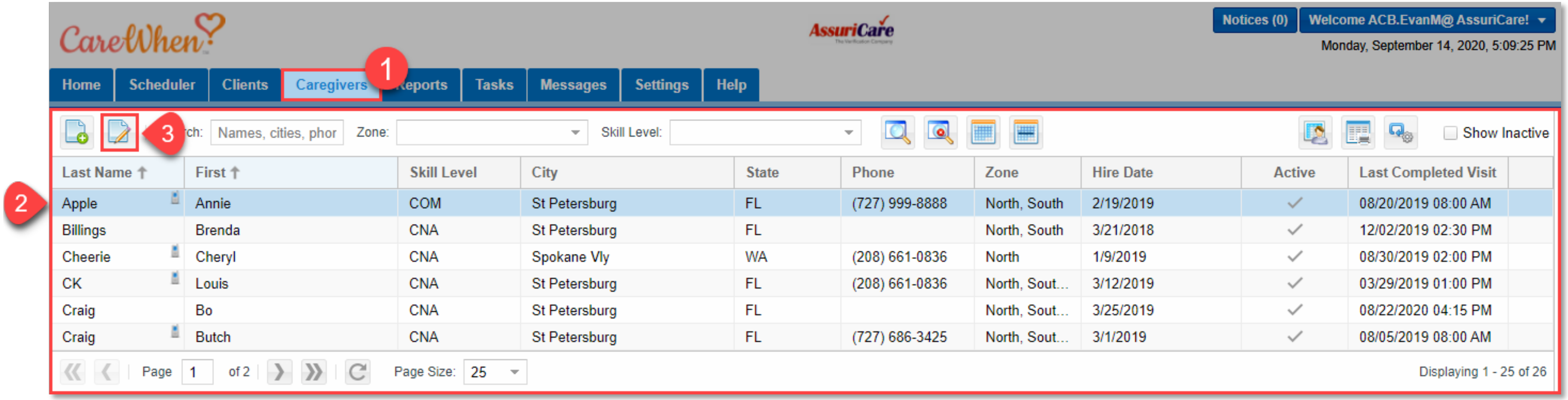
Add Caregiver Skills and Familiar Clients
Set Unavailability

Records

Set reminders
Add notes
Manage time sheets
View Caregiver record history

Editing a Caregiver – Getting Started

To access the editing options for a Caregiver within CareWhen, navigate to the Caregivers tab, select the Caregiver you'd like to manage, and then click the edit icon. Additionally, the Caregiver's name may be double clicked to begin editing.



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Editing a Caregiver – Editing Information

Personal Information Tab

Use the Personal tab to edit a Caregivers identifying information, as well as their address and contact information.

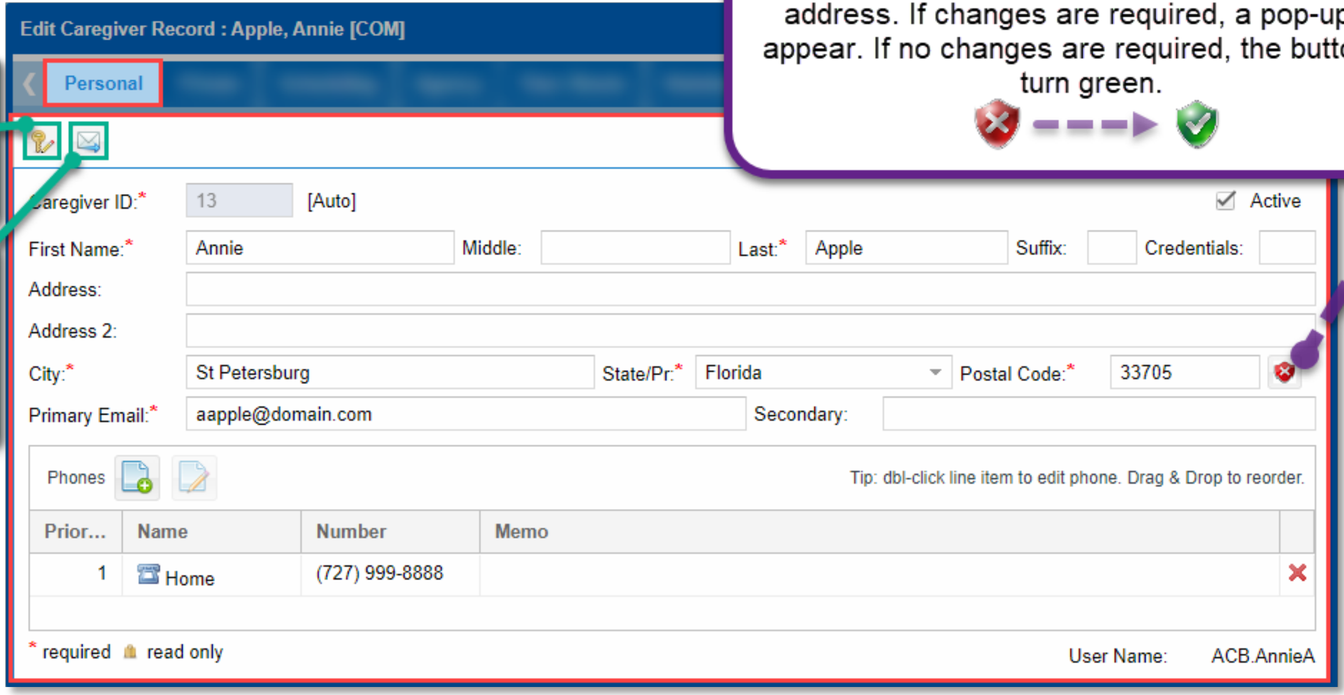
Common Actions:

- Updating a Caregiver's address after a move
- Adding, removing, or updating a Caregiver's phone information
- Correct spelling issues

Reset a user's login information if required

Resend a Caregiver's account activation information

When updating a Caregiver's address, use 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.



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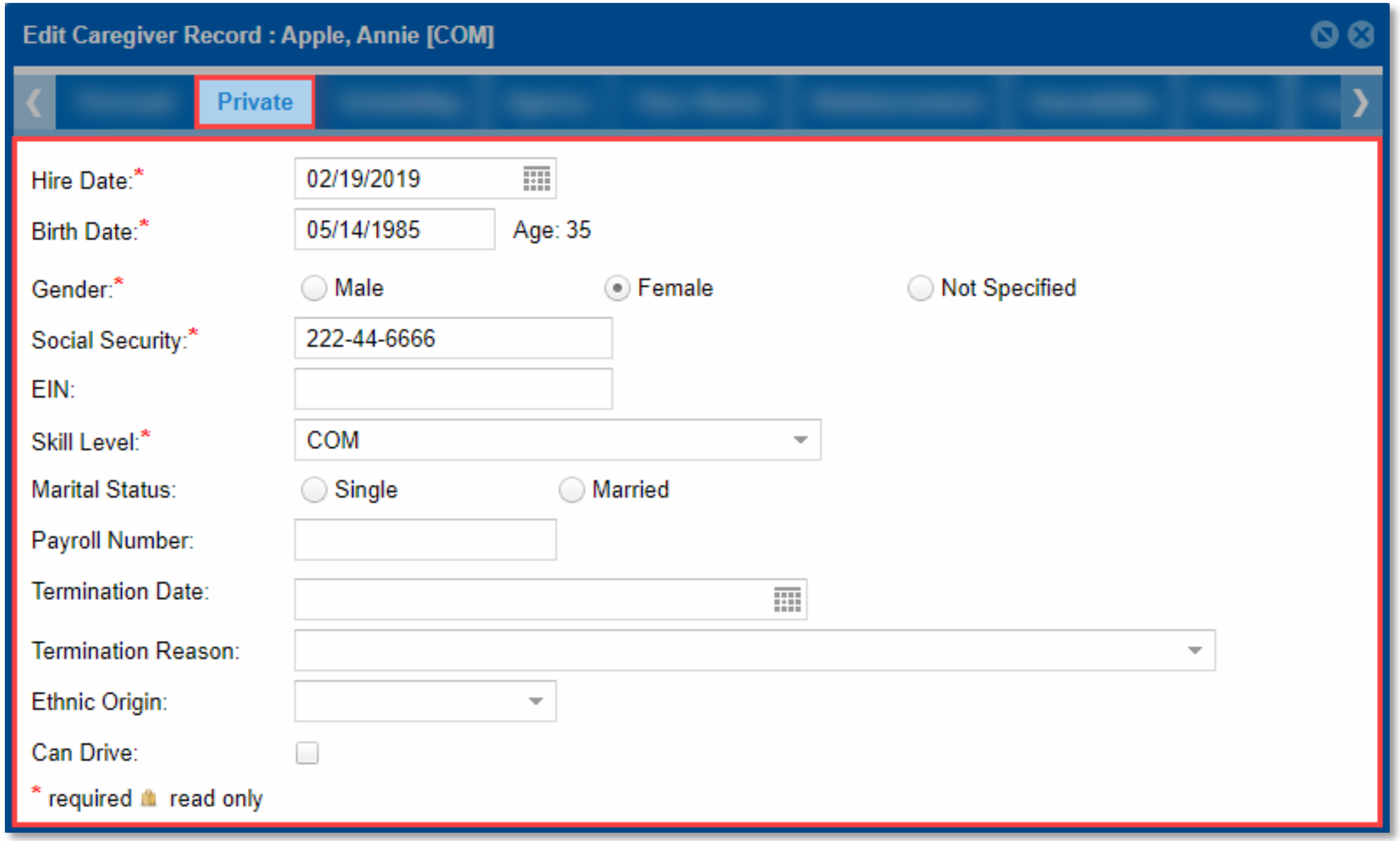
Editing a Caregiver – Editing Information

Private Information Tab

Use the Private tab to edit a Caregiver's secured information, such as SSN or EIN, birth date, and marital status.

Common Actions:

- Remove a Caregiver from the Agency with a date and reason. By entering a removal date and reason, the caregiver will be marked as inactive once Saved.
- Change the skill level of the caregiver



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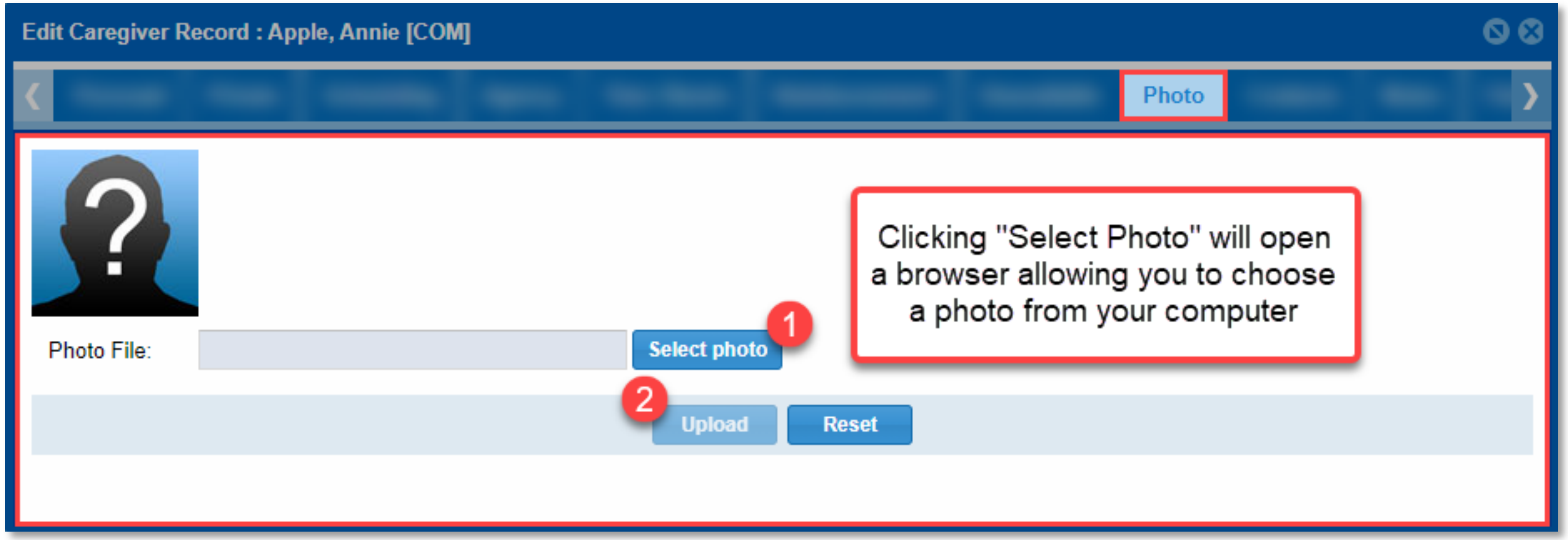
Editing a Caregiver – Editing Information

Photo Tab

Use the Photo tab to upload a photo of the Caregiver to be used in CareWhen.

Common Actions:

- Update a Caregiver's photo by selecting a new version from your computer



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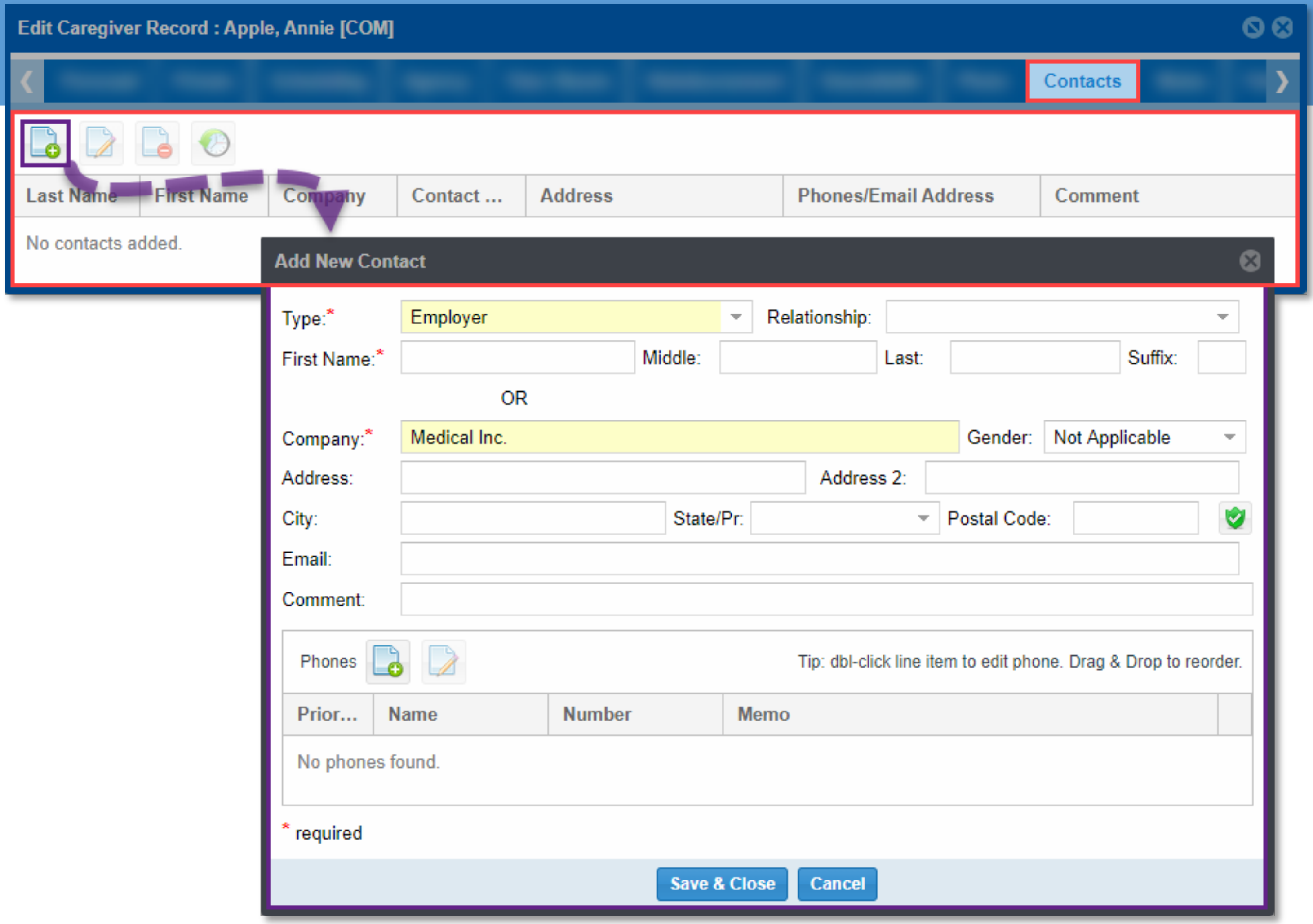
Editing a Caregiver – Editing Information

Contacts Tab

The Contact tab allows you to add, delete, or edit points of contact for the Caregiver, such as a doctor or family member.



Common Actions:

- Add backup contacts for a Caregiver to ensure that there is a way to contact them in case of emergencies.

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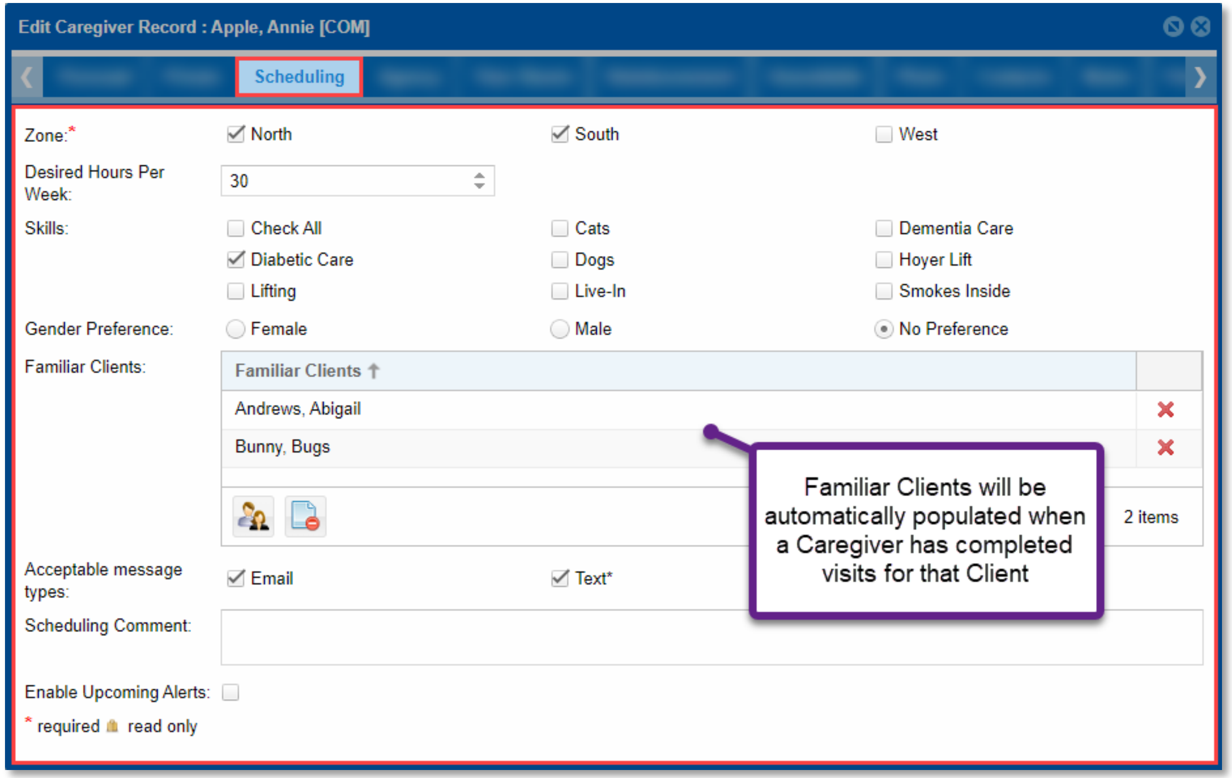
Editing a Caregiver – Scheduling

Scheduling Tab

Use the Scheduling tab to edit information pertaining to a Caregiver's scheduling options.

Common Actions:

- Add Familiar Clients to the Caregiver's record
- Edit the caregiver's assigned zones
- Edit the Caregiver's Skills designations. These will be used to match up with Client needs (if enabled)
- Enable text messages
- Update a Caregivers desired hours



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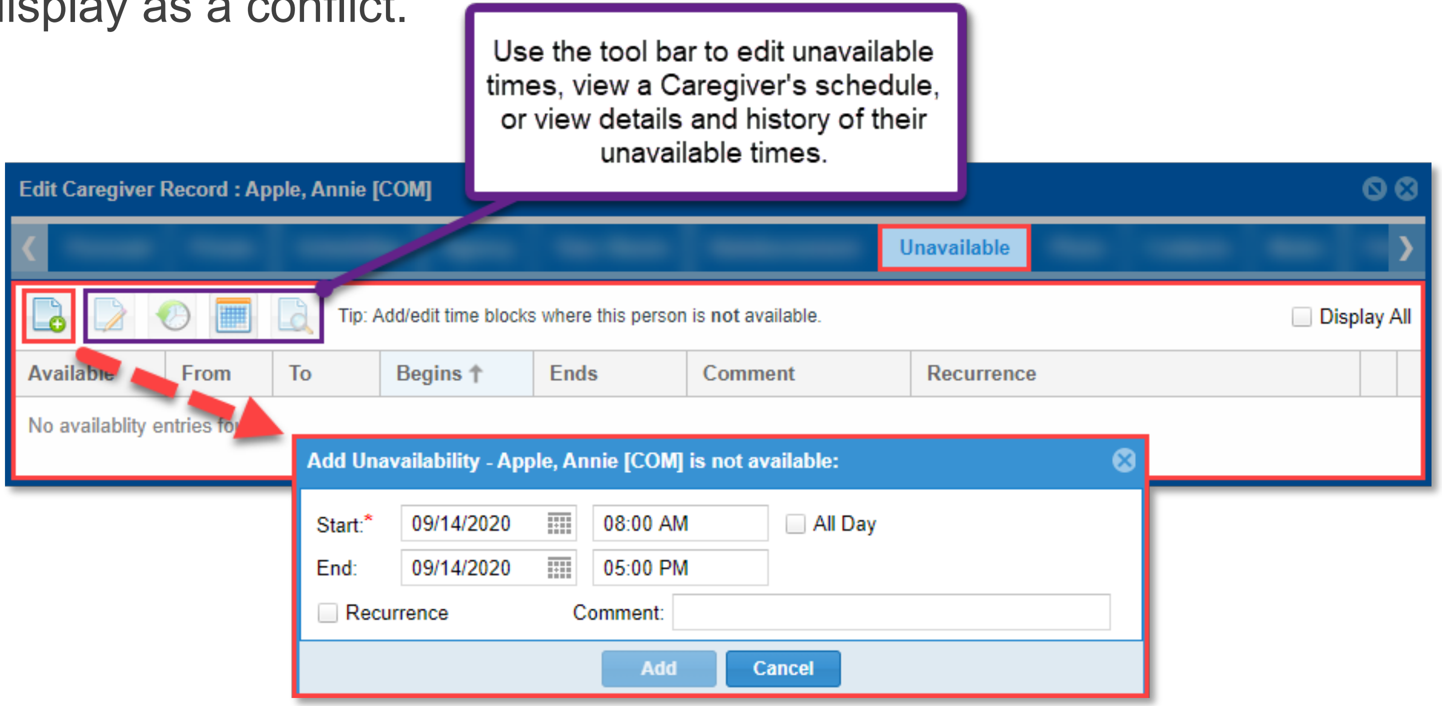
Editing a Caregiver – Scheduling

Unavailable Tab

Use the Unavailable tab to designate times that a Caregiver is unable to provide care for Clients. Attempting to schedule visits if a Caregiver is Unavailable will prompt a warning, and if future visits overlap with a Caregiver's unavailable time designations, these visits will display as a conflict.

Common Actions:

- Add or modifying recurring unavailable date for Caregivers
- View a Caregivers monthly schedule



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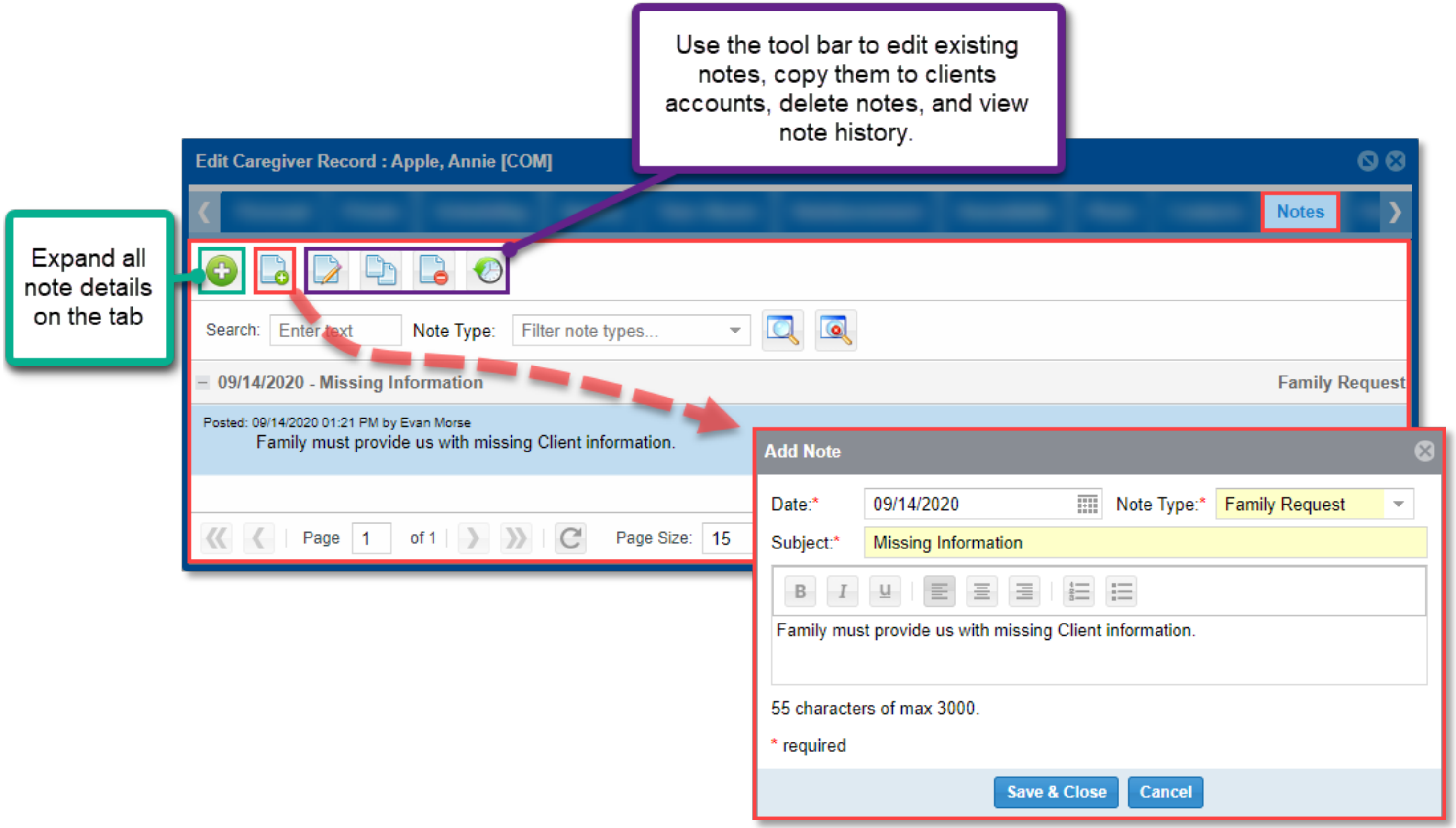
Editing a Caregiver – Records

Notes Tab

Use the Notes tab to enter or edit notes pertaining to the Caregiver you'd like to manage. See the *CareWhen Configuration* training for instructions on how to set up note types.



Common Actions:

- Add notes regarding rate changes, complaints, billing, or other specific communications relating to the Caregiver.
- Copy notes to Client's accounts via the tool bar.

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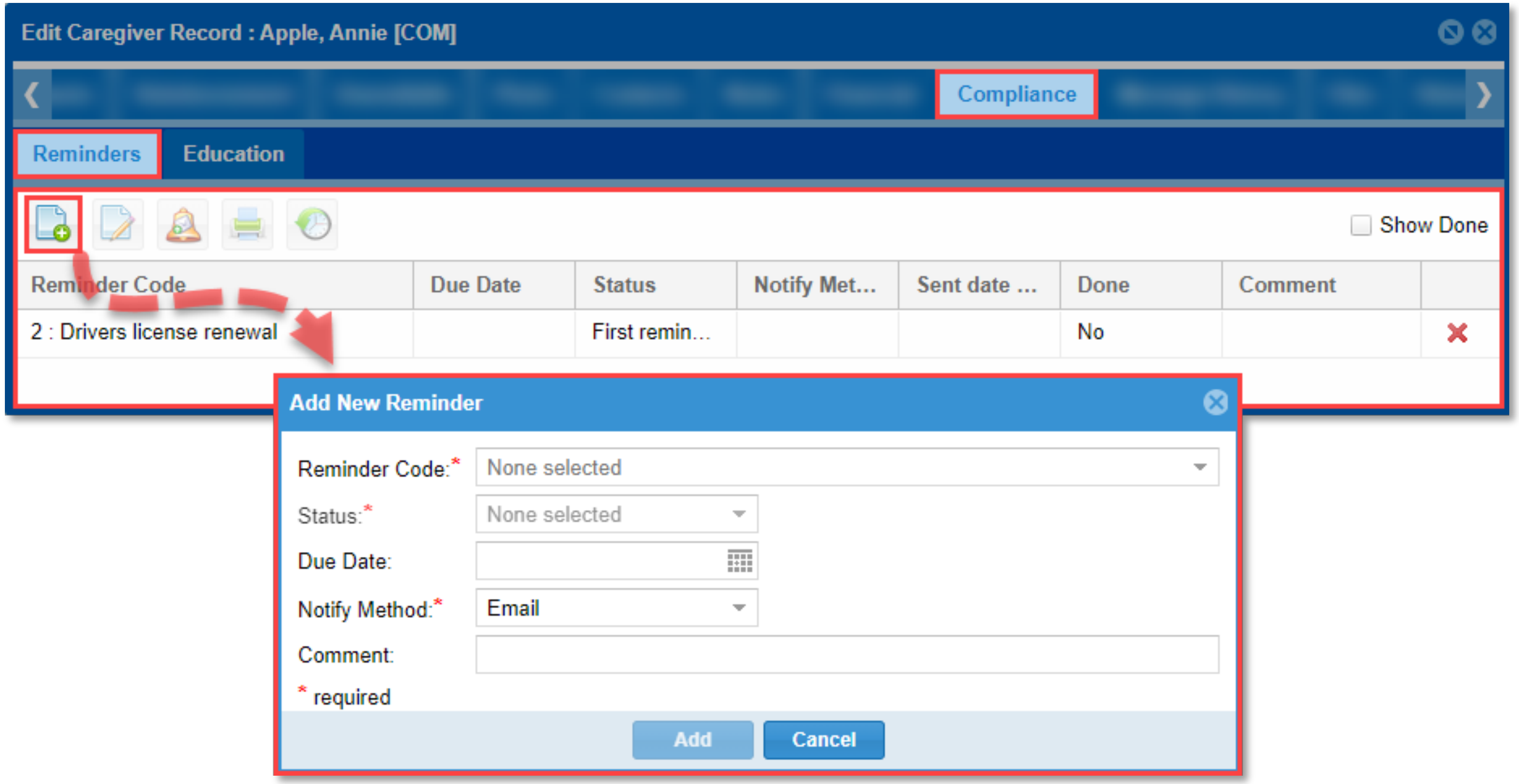
Editing a Caregiver – Records

Compliance Tab: Reminders

Use the Reminders tab to input and edit reminders pertaining to the Caregiver that you are managing. See the *CareWhen Configuration* training for instructions on how to set up reminder types.



Common Actions:

- Add reminders about licensure expirations

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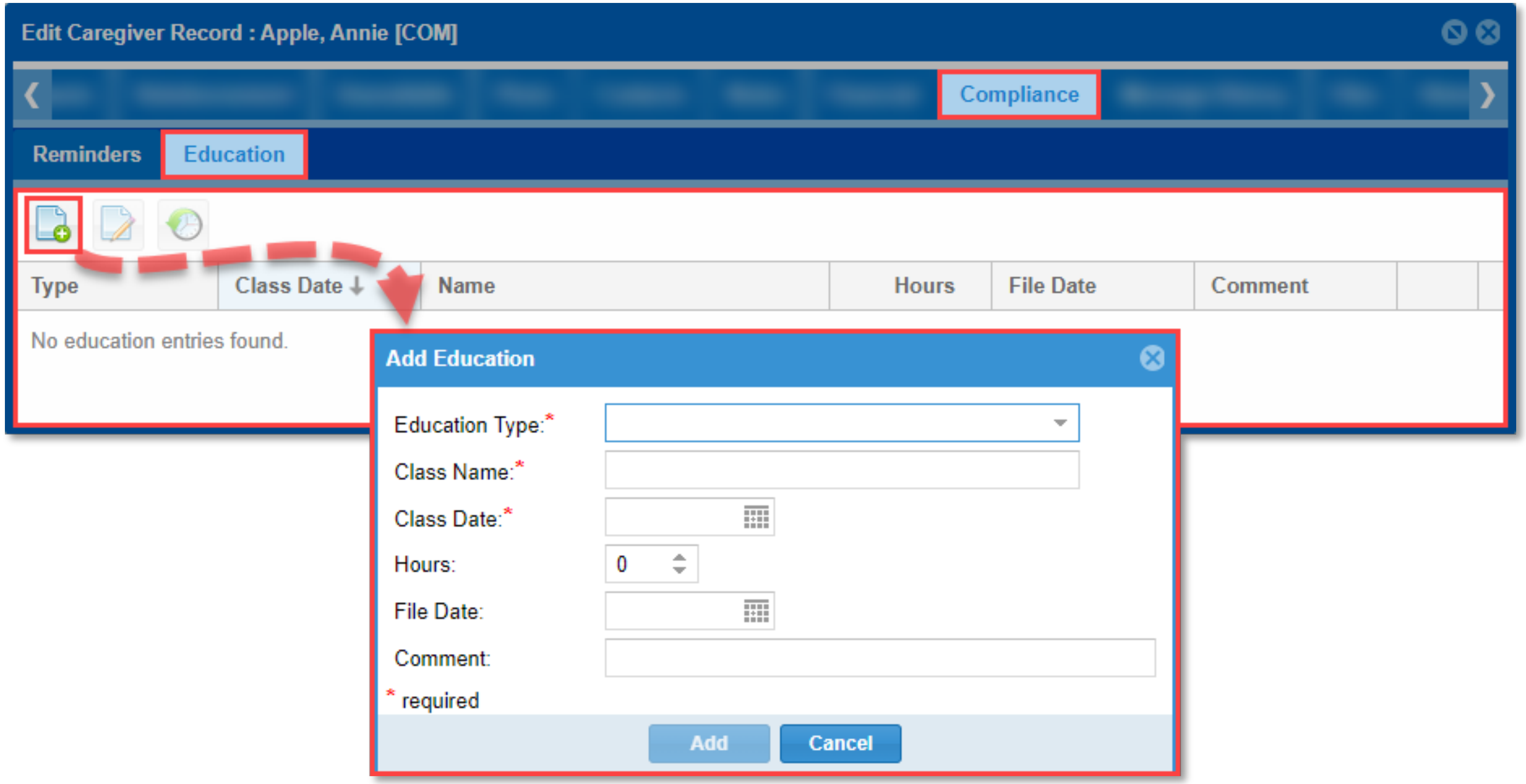
Editing a Caregiver – Records

Compliance Tab: Education

If your Agency tracks Caregiver educational information, use the Reminders: Education tab to document courses, certifications, and other trainings that the Caregiver has acquired / taken.



Common Actions:

- Update a Caregiver's account when they have completed HIPAA certification or CPR certification

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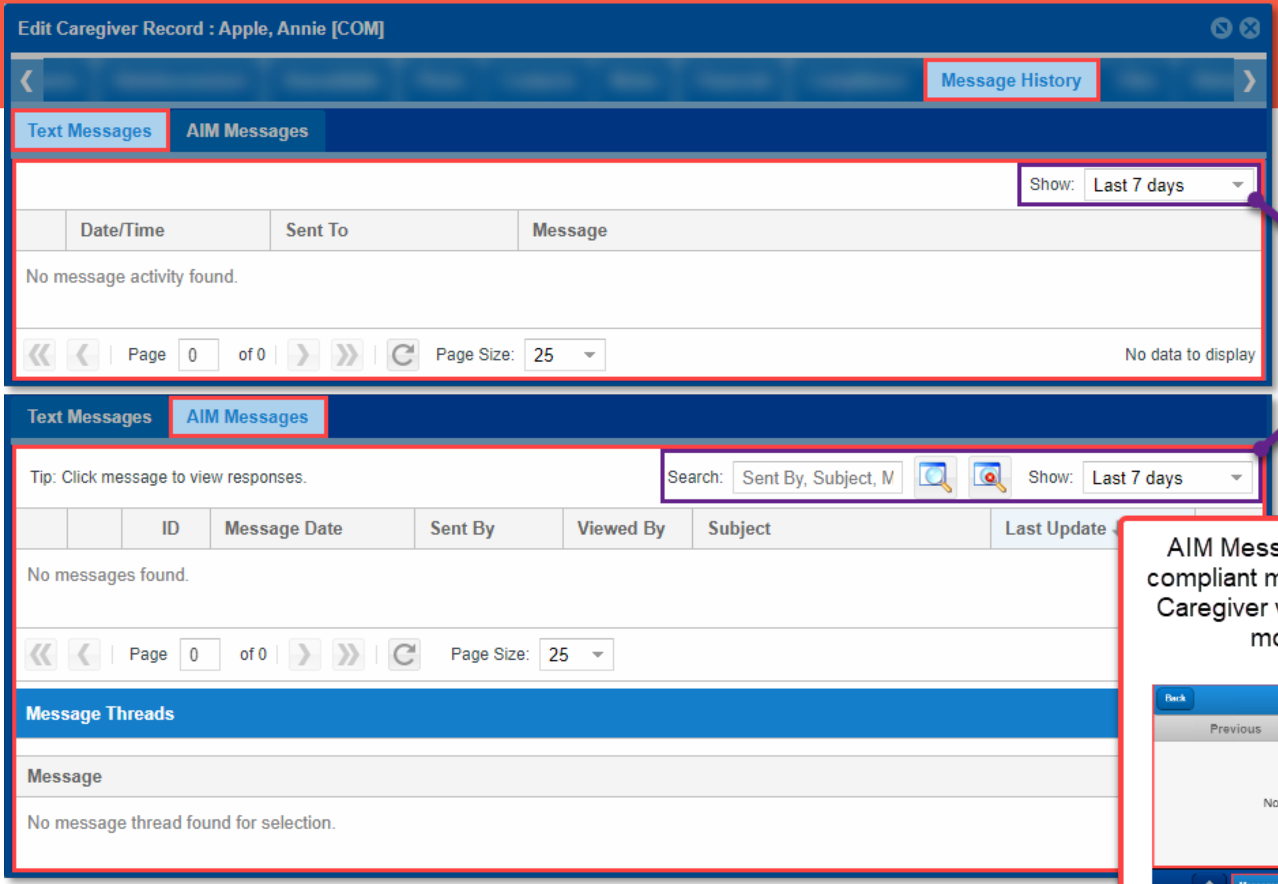
Editing a Caregiver – Records

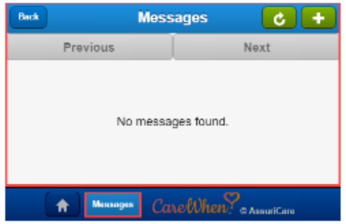
Message History Tab

- The Text Message tab keeps a record of “Find Availability” text messages that have been sent to Caregivers, as well as their replies.
- AIM Messages keeps a log of all Agency Internal Messages and conversations involving a Caregiver that has “AIM Recipient” enabled from the Agency tab.
- *See the Creating & Managing Visits training for more information and instructions on how to find available caregivers using this functionality.*



Use the search functionality to narrow which messages are displayed.

AIM Messages are HIPAA compliant messages sent to a Caregiver via the CareWhen mobile app.



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Editing a Caregiver – Records

Files Tab

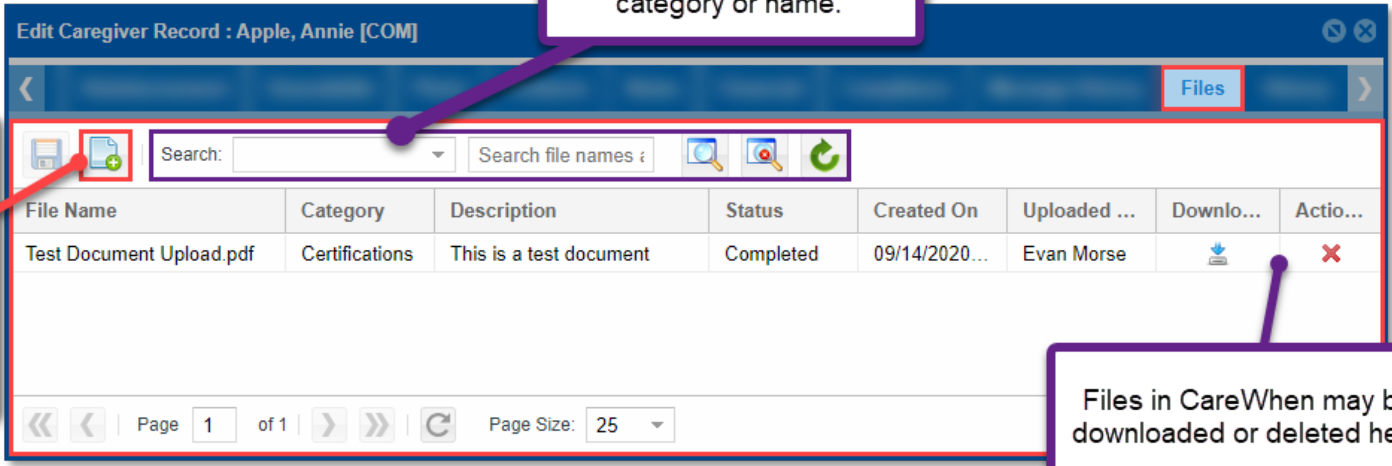
From the Files tab, you can upload and store required files for a Caregiver's profile. File types are tied to User Roles, and designated file categories are created in the Agency Settings tab. See the *CareWhen Configuration* training for more instructions.

Common Actions:

- Upload copies of certifications and caregiver rate agreements

Use the tool bar to search for uploaded files by file category or name.

Use the Add button to upload documents from your computer



Files in CareWhen may be downloaded or deleted here

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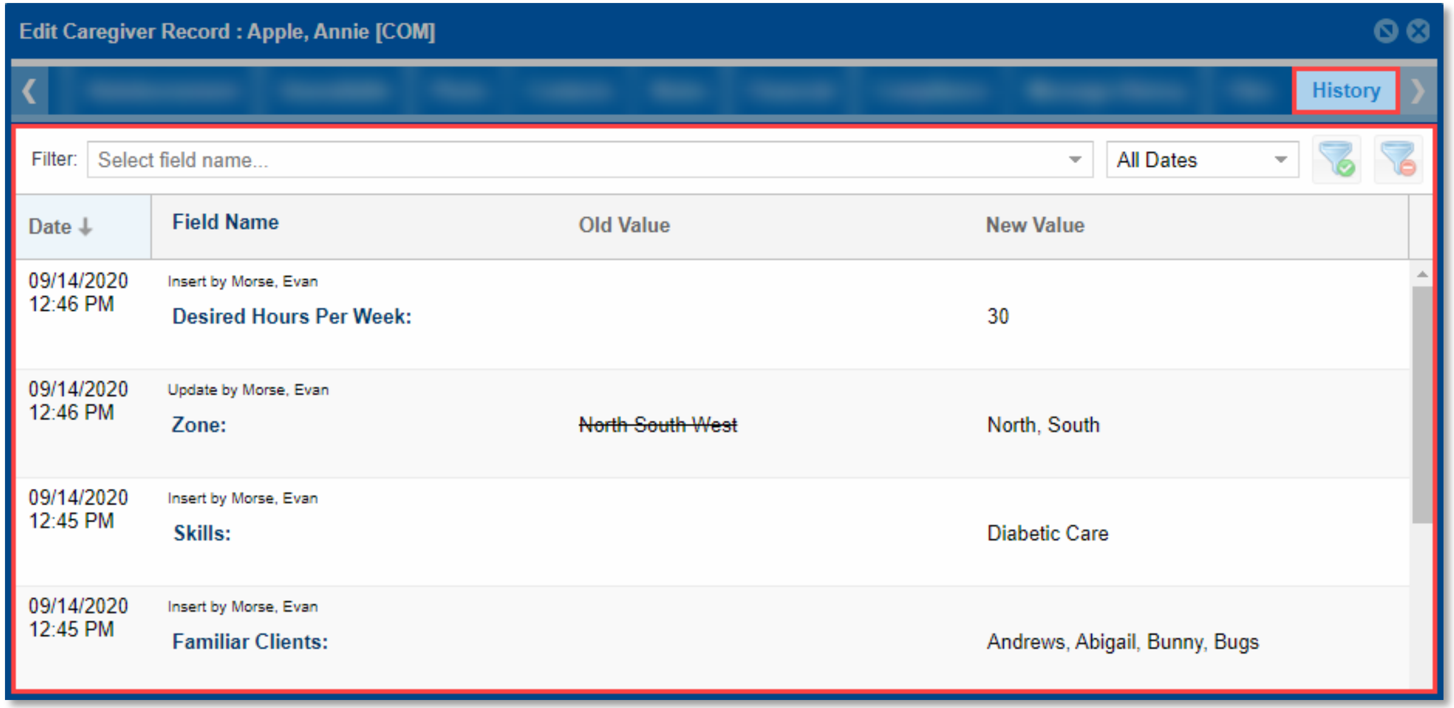
Editing a Caregiver – Records

History Tab

The History tab can be used to review any changes to the Caregiver's record that have been made in CareWhen.



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