



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.

The screenshot shows the CareWhen interface with the following details:

- Header: CareWhen logo, AssuriCare logo, Notices (0), Welcome ACB.EvanM@ AssuriCare!, Monday, September 14, 2020, 5:09:25 PM
- Navigation: Home, Scheduler, Clients, **Caregivers** (highlighted with a red circle and '1'), Reports, Tasks, Messages, Settings, Help
- Search: Search: Names, cities, phor (highlighted with a red circle and '3'), Zone: [dropdown], Skill Level: [dropdown]
- Table (highlighted with a red circle and '2'):

Last Name ↑	First ↑	Skill Level	City	State	Phone	Zone	Hire Date	Active	Last Completed Visit
Apple	Annie	COM	St Petersburg	FL	(727) 999-8888	North, South	2/19/2019	✓	08/20/2019 08:00 AM
Billings	Brenda	CNA	St Petersburg	FL		North, South	3/21/2018	✓	12/02/2019 02:30 PM
Cheerie	Cheryl	CNA	Spokane Vly	WA	(208) 661-0836	North	1/9/2019	✓	08/30/2019 02:00 PM
CK	Louis	CNA	St Petersburg	FL	(208) 661-0836	North, Sout...	3/12/2019	✓	03/29/2019 01:00 PM
Craig	Bo	CNA	St Petersburg	FL		North, Sout...	3/25/2019	✓	08/22/2020 04:15 PM
Craig	Butch	CNA	St Petersburg	FL	(727) 686-3425	North, Sout...	3/1/2019	✓	08/05/2019 08:00 AM

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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

Edit Caregiver Record : Apple, Annie [COM]

Personal

Caregiver ID:* 13 [Auto] Active



First Name:* Annie Middle: Last:* Apple Suffix: Credentials:


Address:


Address 2:

City:* St Petersburg State/Pr:* Florida Postal Code:* 33705

Primary Email:* aapple@domain.com Secondary:

Phones   Tip: dbl-click line item to edit phone. Drag & Drop to reorder.

Prior...	Name	Number	Memo
1	 Home	(727) 999-8888	

* required  read only User Name: ACB.AnnieA

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.



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

Edit Caregiver Record : Apple, Annie [COM]

Private

Hire Date:* 02/19/2019

Birth Date:* 05/14/1985 Age: 35

Gender:* Male Female Not Specified

Social Security:* 222-44-6666

EIN:

Skill Level:* COM

Marital Status: Single Married

Payroll Number:

Termination Date:

Termination Reason:

Ethnic Origin:

Can Drive:

* required 🗝️ read only

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

Edit Caregiver Record : Apple, Annie [COM]

Photo

Photo File: Select photo ¹

Upload Reset ²

Clicking "Select Photo" will open a browser allowing you to choose a photo from your computer

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.

The screenshot shows the 'Edit Caregiver Record : Apple, Annie [COM]' window. The 'Contacts' tab is active. Below the tab are icons for adding, editing, deleting, and refreshing contacts. A table with columns 'Last Name', 'First Name', 'Company', 'Contact ...', 'Address', 'Phones/Email Address', and 'Comment' is shown, with the message 'No contacts added.' below it. An 'Add New Contact' dialog box is open, containing the following fields:

- Type: * (dropdown menu with 'Employer' selected)
- Relationship: (dropdown menu)
- First Name: * (text input), Middle: (text input), Last: (text input), Suffix: (text input)
- OR
- Company: * (dropdown menu with 'Medical Inc.' selected)
- Gender: (dropdown menu with 'Not Applicable' selected)
- Address: (text input), Address 2: (text input)
- City: (text input), State/Pr: (dropdown menu), Postal Code: (text input) with a green checkmark icon
- Email: (text input)
- Comment: (text input)

Below the dialog box is a 'Phones' section with a table:

Prior...	Name	Number	Memo
No phones found.			

* required

Buttons: Save & Close, Cancel

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

Zone: North South West

Desired Hours Per Week: 30

Skills: Check All Diabetic Care Lifting Cats Dogs Live-In Dementia Care Hoyer Lift Smokes Inside

Gender Preference: Female Male No Preference

Familiar Clients:

Familiar Clients ↑	
Andrews, Abigail	✘
Bunny, Bugs	✘

2 items

Acceptable message types: Email Text*

Scheduling Comment:

Enable Upcoming Alerts:

* required 📄 read only

Familiar Clients will be automatically populated when a Caregiver has completed visits for that Client

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

The screenshot shows the 'Edit Caregiver Record' interface for 'Apple, Annie [COM]'. The 'Unavailable' tab is selected. A tooltip points to the toolbar, stating: 'Use the tool bar to edit unavailable times, view a Caregiver's schedule, or view details and history of their unavailable times.' The main table has columns: Available, From, To, Begins ↑, Ends, Comment, and Recurrence. A red box highlights the 'Add' icon in the toolbar. A dialog box titled 'Add Unavailability - Apple, Annie [COM] is not available:' is open, showing fields for Start (09/14/2020, 08:00 AM), End (09/14/2020, 05:00 PM), and an 'All Day' checkbox. There is also a 'Recurrence' checkbox and a 'Comment' field. 'Add' and 'Cancel' buttons are at the bottom.

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.

The screenshot displays the 'Edit Caregiver Record : Apple, Annie [COM]' interface. The 'Notes' tab is active, showing a list of notes. A red dashed arrow points from the 'Add Note' button in the toolbar to the 'Add Note' dialog box. The dialog box contains the following fields:

- Date: 09/14/2020
- Note Type: Family Request
- Subject: Missing Information
- Text: Family must provide us with missing Client information.
- Character count: 55 characters of max 3000.
- Buttons: Save & Close, Cancel

Callouts in the image provide additional context:

- Expand all note details on the tab:** Points to the expand icon in the toolbar.
- Use the tool bar to edit existing notes, copy them to clients accounts, delete notes, and view note history:** Points to the entire toolbar area.

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

The screenshot displays the 'Edit Caregiver Record' interface for 'Apple, Annie [COM]'. The 'Compliance' tab is active, and the 'Reminders' sub-tab is selected. A table lists reminders, with one entry '2 : Drivers license renewal' highlighted. A modal window 'Add New Reminder' is open, showing fields for Reminder Code, Status, Due Date, Notify Method, and Comment.

Reminder Code	Due Date	Status	Notify Met...	Sent date ...	Done	Comment	
2 : Drivers license renewal		First remin...			No		✖

Add New Reminder

Reminder Code:* None selected

Status:* None selected

Due Date:

Notify Method:* Email

Comment:

* required

Add Cancel

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

The screenshot shows the 'Edit Caregiver Record' interface for 'Apple, Annie [COM]'. The 'Compliance' tab is selected, and the 'Education' sub-tab is active. A table with columns 'Type', 'Class Date', 'Name', 'Hours', 'File Date', and 'Comment' is shown, with the message 'No education entries found.' A red dashed arrow points from the 'Add' icon (a document with a plus sign) to the 'Add Education' modal form. The modal form contains the following fields:

- Education Type:*
- Class Name:*
- Class Date:*
- Hours: 0
- File Date:
- Comment:

* required

Buttons: Add, Cancel

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.

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

File Name	Category	Description	Status	Created On	Uploaded ...	Downlo...	Actio...
Test Document Upload.pdf	Certifications	This is a test document	Completed	09/14/2020...	Evan Morse		

Files in CareWhen may be downloaded or deleted here

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.

Date ↓	Field Name	Old Value	New Value
09/14/2020 12:46 PM	Insert by Morse, Evan Desired Hours Per Week:		30
09/14/2020 12:46 PM	Update by Morse, Evan Zone:	North-South West	North, South
09/14/2020 12:45 PM	Insert by Morse, Evan Skills:		Diabetic Care
09/14/2020 12:45 PM	Insert by Morse, Evan Familiar Clients:		Andrews, Abigail, Bunny, Bugs