

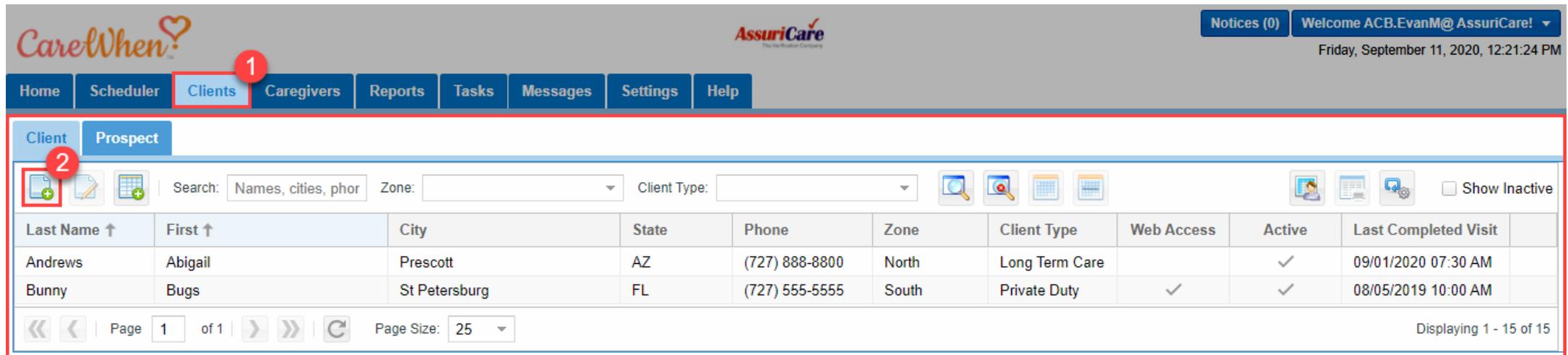


CareWhen Training

Adding & Inactivating Clients

Adding a Client – Getting Started

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

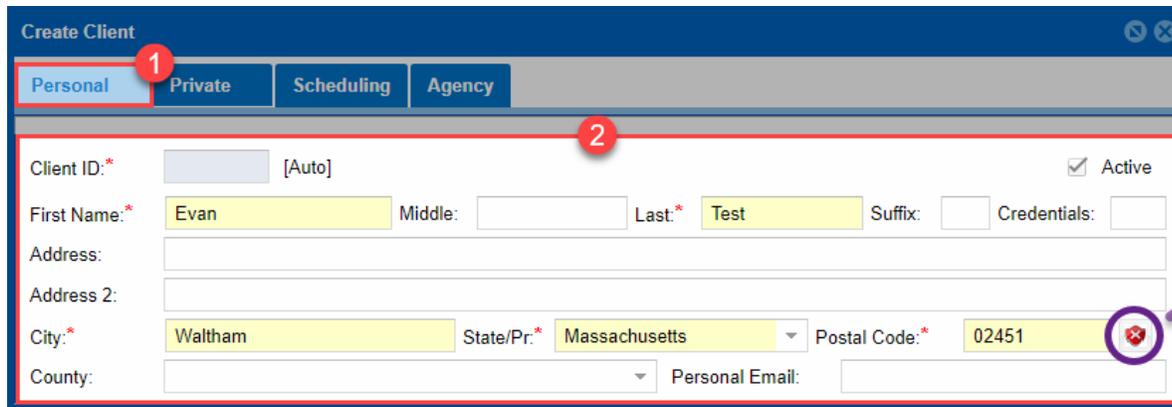


The screenshot shows the CareWhen interface. At the top, there is a navigation bar with tabs: Home, Scheduler, Clients (highlighted with a red box and a red circle with the number 1), Caregivers, Reports, Tasks, Messages, Settings, and Help. Below the navigation bar, there is a sub-navigation bar with tabs: Client (highlighted with a red box and a red circle with the number 2) and Prospect. Below the sub-navigation bar, there is a search and filter area with a search box containing "Names, cities, phor", a Zone dropdown, and a Client Type dropdown. Below the search and filter area, there is a table of clients. The table has columns: Last Name, First, City, State, Phone, Zone, Client Type, Web Access, Active, and Last Completed Visit. The table contains two rows of data: Andrews, Abigail, Prescott, AZ, (727) 888-8800, North, Long Term Care, and Bunny, Bugs, St Petersburg, FL, (727) 555-5555, South, Private Duty. Below the table, there is a pagination area with "Page 1 of 1" and "Page Size: 25".

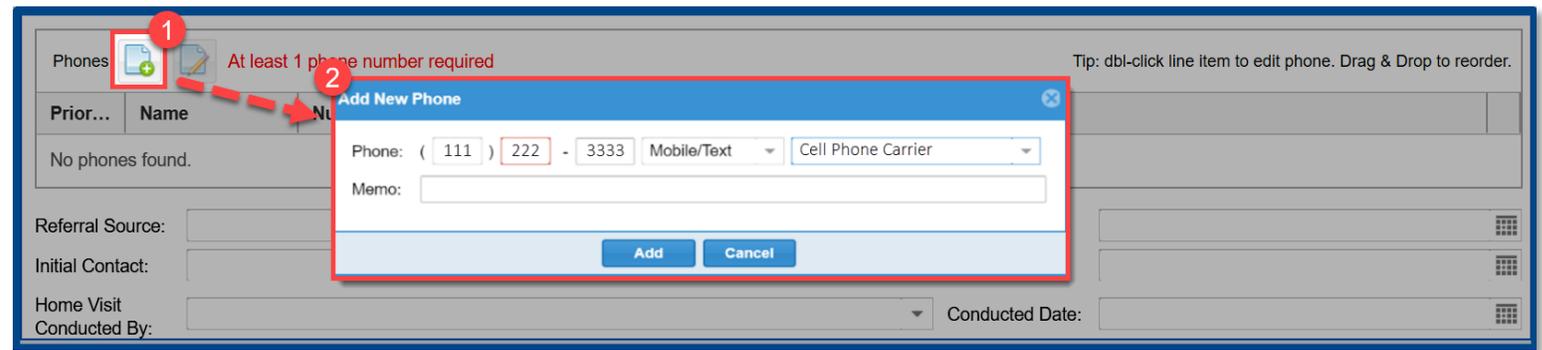
Last Name ↑	First ↑	City	State	Phone	Zone	Client Type	Web Access	Active	Last Completed Visit
Andrews	Abigail	Prescott	AZ	(727) 888-8800	North	Long Term Care		✓	09/01/2020 07:30 AM
Bunny	Bugs	St Petersburg	FL	(727) 555-5555	South	Private Duty	✓	✓	08/05/2019 10:00 AM

Adding a Client – Personal Information

The first of four input tabs is the Personal tab. Here you enter general information for the Client. Items that are required for this step are marked with red stars. To add phone numbers to a Client, select the Plus button, input their complete phone information and click Add. Multiple numbers can be dragged into priority order.

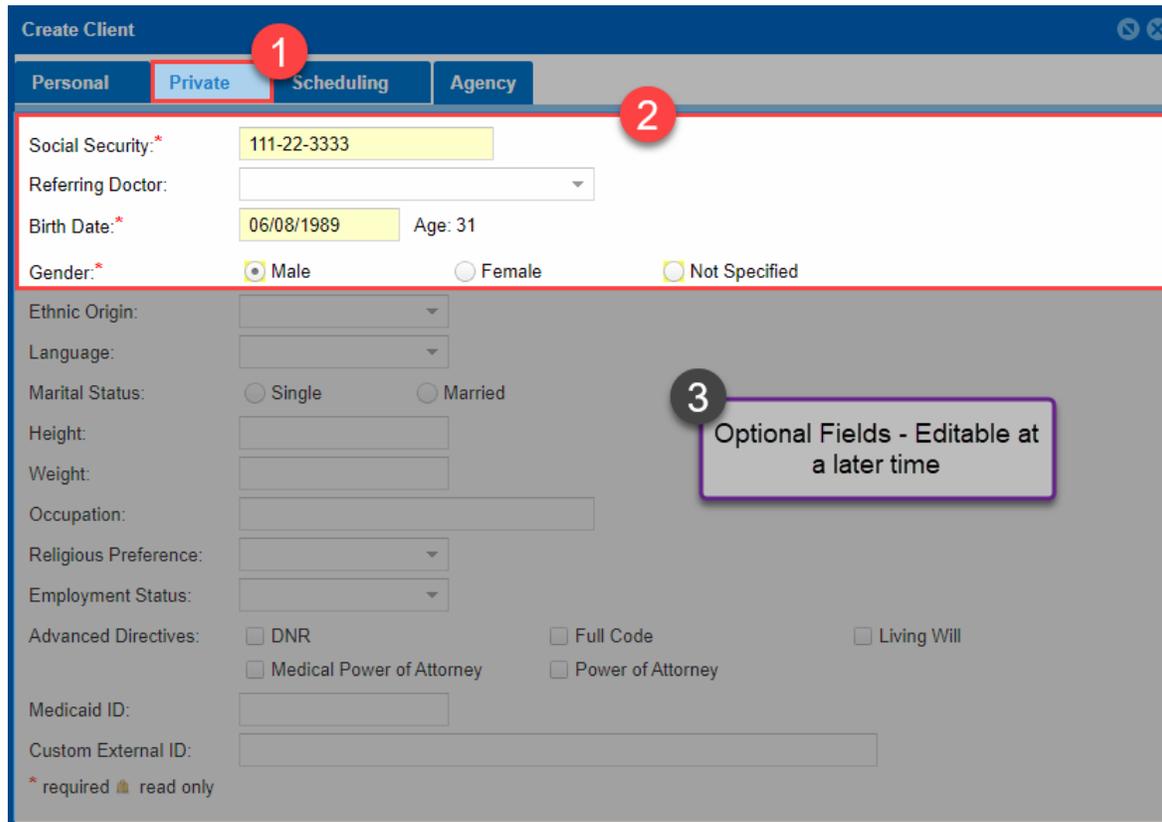


Click the Address Validation button to verify your entered address. If changes are required, a pop-up will appear. If no changes are required, the button will turn green.



Adding a Client – Private Information

The second tab is the Private tab. Here, input the Client's Social Security Number and their Date of Birth, select their Gender, and input any available option information.



1

2

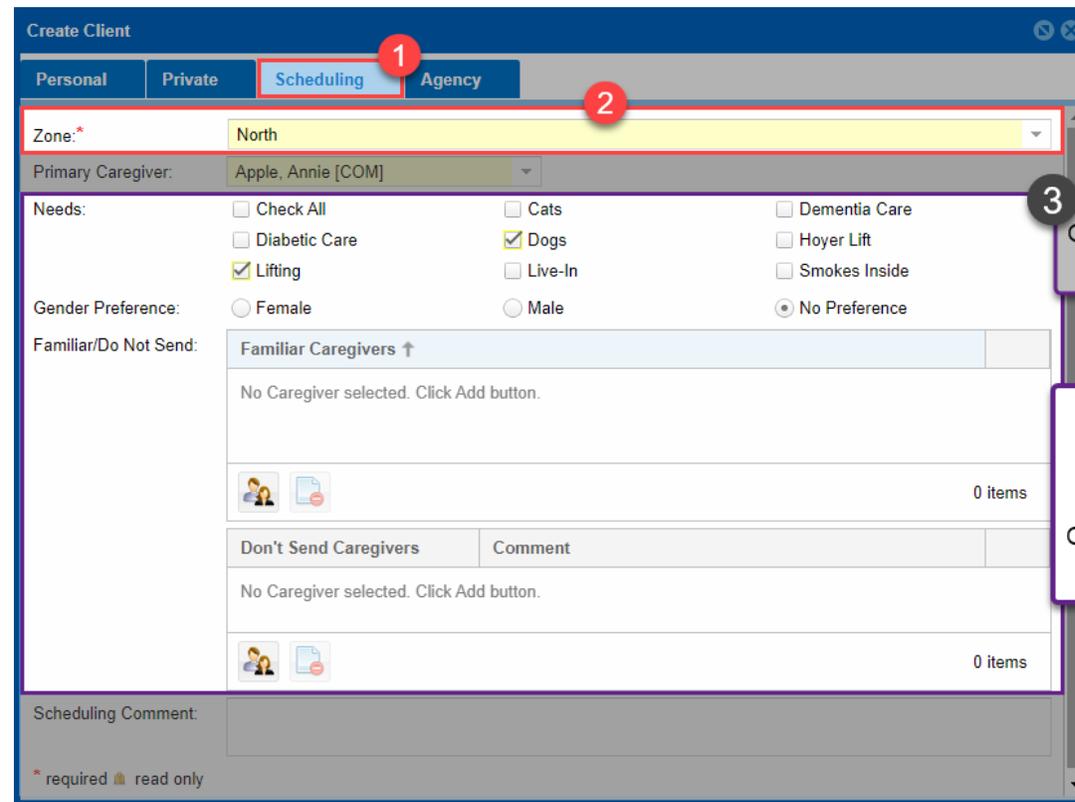
3

Optional Fields - Editable at a later time

Adding a Client – Schedule Information

From the Scheduling tab, you must select the Client's service Zone and Case Owner. You may then enter in any available optional information.

- Clients are assigned to one zone; this selection will be used to match them with Caregivers that service their area.
- The Needs on the Scheduling tab will be used to match the client up with the Caregiver's Skills. If the caregiver does not have a particular client need, a warning will generate when assigning the visit (if enabled).



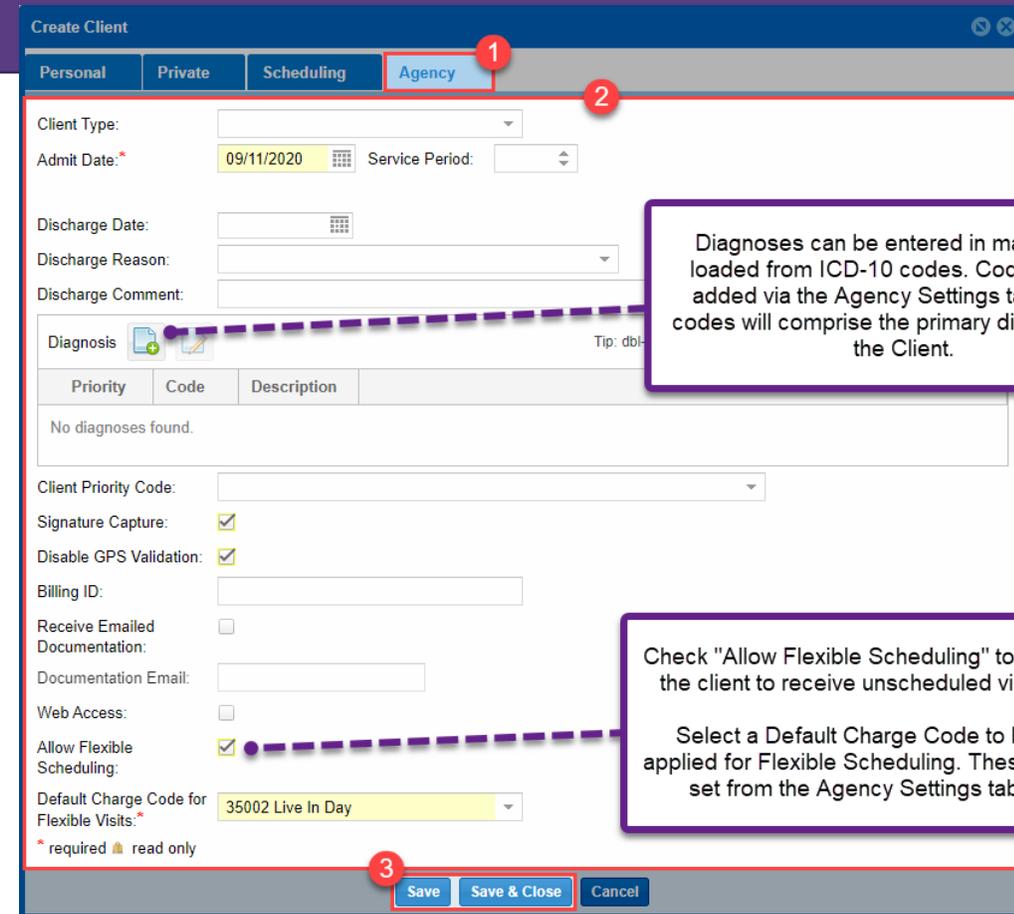
Optional Fields - Editable at a later time

Client's Needs work in combination with their designated Zone and Familiar / Do Not Send Caregivers to pair them with Caregivers

Adding a Client – Agency Information

Finally, from the Agency tab, input any available information in the provided fields. Once complete, click Save and Close.

- The client type refers to the payer – often this is Private Duty, LTCL, or Medicaid.
- List any diagnoses or client priority information necessary
- Diagnoses codes can either be entered as ICD codes or freeform
- Allow Flexible scheduling should be checked off to allow the client to receive unscheduled visits



1 Agency tab

2 Form fields

3 Save & Close button

Diagnoses can be entered in manually, or loaded from ICD-10 codes. Codes can be added via the Agency Settings tab. These codes will comprise the primary diagnoses for the Client.

Check "Allow Flexible Scheduling" to allow the client to receive unscheduled visits.

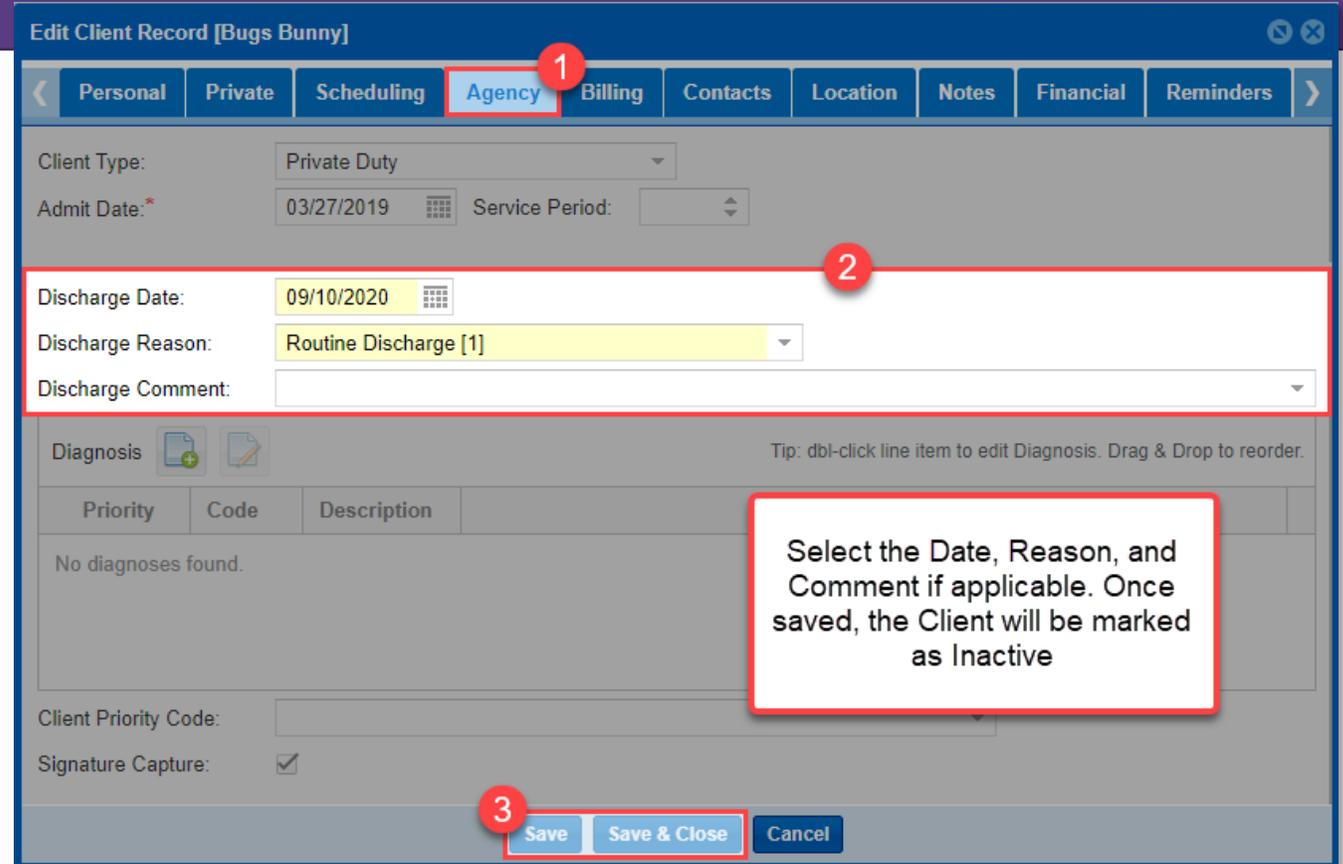
Select a Default Charge Code to be applied for Flexible Scheduling. These are set from the Agency Settings tab.

Inactivating a Client

Inactivating a Client in CareWhen is straightforward as well. Simply click into the client and then select the discharge date and reason on the Agency tab.

Once inactivated:

- Any active orders will end
- Caregivers will not be able to check in or out for that client
- When looking at client reports, you can elect to include inactive caregivers or exclude them



Edit Client Record [Bugs Bunny]

Personal Private Scheduling **Agency** Billing Contacts Location Notes Financial Reminders

Client Type: Private Duty
Admit Date: 03/27/2019 Service Period: []

Discharge Date: 09/10/2020
Discharge Reason: Routine Discharge [1]
Discharge Comment: []

Diagnosis [] [] Tip: dbl-click line item to edit Diagnosis. Drag & Drop to reorder.

Priority	Code	Description
No diagnoses found.		

Client Priority Code: []
Signature Capture:

Save Save & Close Cancel

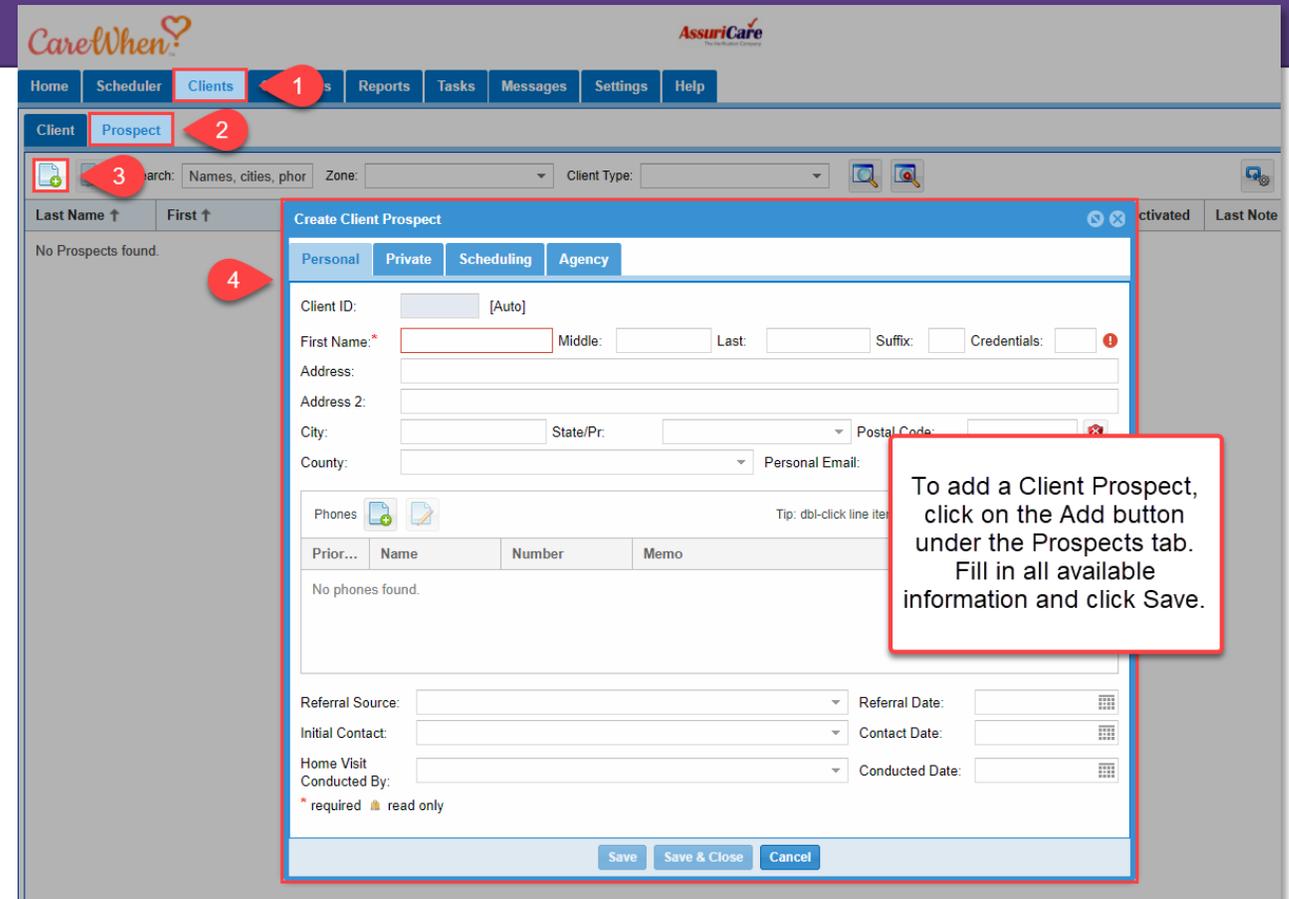
Select the Date, Reason, and Comment if applicable. Once saved, the Client will be marked as Inactive

Creating Client Prospects

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

With client prospects you can track:

- Contact information
- Referral sources
- Potential client needs
- Additional demographic and scheduling information



1 Clients

2 Prospect

3 Add

4 Form area

Create Client Prospect

Personal Private Scheduling Agency

Client ID: [Auto]

First Name: * [] Middle: [] Last: [] Suffix: [] Credentials: []

Address: []

Address 2: []

City: [] State/Pr: [] Postal Code: []

County: [] Personal Email: []

Phones [] [] Tip: dbl-click line item

Prior...	Name	Number	Memo
No phones found.			

Referral Source: [] Referral Date: []

Initial Contact: [] Contact Date: []

Home Visit Conducted By: [] Conducted Date: []

* required [] read only

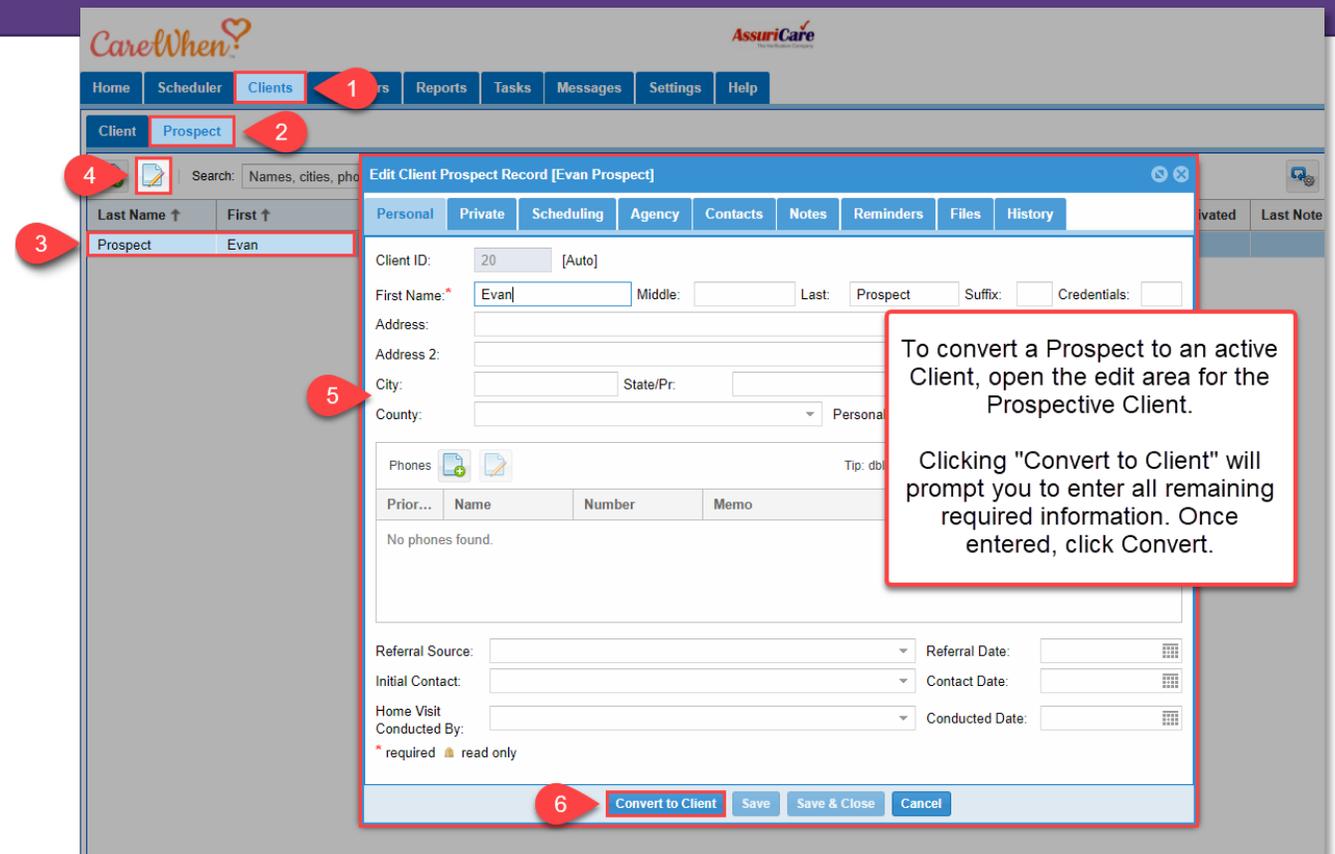
Save Save & Close Cancel

To add a Client Prospect, click on the Add button under the Prospects tab. Fill in all available information and click Save.

Converting Client Prospects to Active

When you are ready to convert a client prospect to active, simply open the Prospective Client record and click Convert to Client.

- When you convert the client, CareWhen will prompt you to enter any required information before allowing conversion. For example:
 - Full Address
 - Birth Date
 - Social Security Number
- Once converted you will be able to schedule visits for the new client



To convert a Prospect to an active Client, open the edit area for the Prospective Client.

Clicking "Convert to Client" will prompt you to enter all remaining required information. Once entered, click Convert.