

CareWhen Training

Adding & Inactivating Clients

AssuriCare Proprietary and Confidential

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.

CarelVhe	"S		AssuriCare					Notices (0) Welcome ACB.EvanM@ AssuriCare! - Friday. September 11, 2020, 12:21:24 P		
Home Schedule	er Clients Caregivers	Reports Tasks Messages	Settings He	slp					, , , , , , , , , , , , , , , , , , , ,	
Client Prospec	t		· ·							
	Search: Names, cities, phor	Zone:	- Client Type:		- 🔍				Show Inactive	
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	
K K Page	1 of 1 💙 🔊 🖸	Page Size: 25 💌							Displaying 1 - 15 of 15	



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.

Create Client	80	
Personal	Private Scheduling Agency	
	2	Click the Address Validation button to varify
Client ID:*	[Auto]	Click the Address validation button to verify
First Name:*	Evan Middle: Last:* Test Suffix: Credentials:	a pop-up will appear. If no changes are
Address:		required, the button will turn green.
Address 2:		
City:*	Waltham State/Pr.* Massachusetts Postal Code.* 02451 Image: Code and Code.*	₩> V
County:	Personal Email:	





Adding a Client – Private Information

Care When?

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.

Create Client			0
Personal Private	Scheduling	Agency	0
Social Security:*	111-22-3333		2
Referring Doctor:			Ŧ
Birth Date:*	06/08/1989	Age: 31	
Gender:*	💽 Male	Female	e 🚺 Not Specified
Ethnic Origin:		T	
Language:		T	
Marital Status:	Single	O Married	3
Height:			Optional Fields - Editable at
Weight:			a later time
Occupation:			
Religious Preference:		Ŧ	
Employment Status:		Ŧ	
Advanced Directives:	DNR		Full Code Living Will
	Medical Power of	of Attorney	Power of Attorney
Medicaid ID:			
Custom External ID:			
* required 🏨 read only			



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).

Create Client				Ø	8
Personal Private	Scheduling Agency				
Zone:*	North			•	
Primary Caregiver:	Apple, Annie [COM]	Ŧ			
Needs:	Check All	Cats	Dementia Care	- 3	
	Diabetic Care	🗹 Dogs	Hoyer Lift		Optional Fields - Editable at
	🗹 Lifting	Live-In	Smokes Inside		a later time
Gender Preference:	Female	Male	 No Preference 		
Familiar/Do Not Send:	Familiar Caregivers 🕇				
	No Caregiver selected. Click Add	d button.		ſ	
					Client's Needs work in
	A	0 items	combination with their designated Zone and Familiar / Do Not Send		
	Don't Send Caregivers		Caregivers to pair them with		
	No Caregiver selected. Click Add	ļ			
	🍇 📮			0 items	
Scheduling Comment:					
* required 🏨 read only					-



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, LTCI, 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

reate Client					08	
Personal Private	Scheduling	Agency				
Client Type:			-			
Admit Date:*	09/11/2020	Service Period:	\$			
Discharge Date:					Discusses can be entered in m	
Discharge Reason:				•	loaded from ICD-10 codes. Cod	es can be
Discharge Comment:				_	added via the Agency Settings ta	ab. These
Diagnosis				īp: dbl-	codes will comprise the primary di the Client.	agnoses for
Priority Code	Description					
No diagnoses found.						
Client Priority Code:					~	
Signature Capture:	\checkmark					
Disable GPS Validation:						
Billing ID:						
Receive Emailed Documentation:				Γ	Check "Allow Flexible Scheduling" to	allow
Documentation Email:					the client to receive unscheduled vis	sits.
Web Access:					Select a Default Charge Code to b	
Allow Flexible Scheduling:				a	applied for Flexible Scheduling. Thes	e are
Default Charge Code for	35002 Live In Day		-	L	set from the Agency Settings tab	р. - П
Flexible Visits:*						



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 Reco	rd (Bugs B	lunny]						0	8			
Personal	Private	Scheduling	Agency Billing	Contacts	Location	Notes	Financial	Reminders	>			
Client Type:	1	Private Duty										
Admit Date:*		03/27/2019	Service Period:	-								
					2							
Discharge Date:	(09/10/2020			-							
Discharge Reas	on:	Routine Discharge	[1]									
Discharge Com	nent:								-			
Diagnosis	3			Tij	Tip: dbl-click line item to edit Diagnosis. Drag & Drop to reorder.							
Priority	Code	Description		ſ								
No diagnoses found. No diagnoses found. Select the Date, Reason, and Comment if applicable. Once saved, the Client will be marked as Inactive								nd ce ked				
Client Priority Co	ode:	•	_									
Signature Captu	re: 🗹	1										
			Save Save 8	& Close Ca	incel							



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

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me Sched	uler	Clients	<	1 s	Repor	ts T	asks	Messages	s Setting	gs Help							
ient Prosp	pect	2		-													
3	arch:	Names, cit	ties, pł	hor Zon	1e:			•	Client Type:			•					R
st Name 🕇	Fin	st 🕇		Create (Client Pr	ospect									0 0	ctivated	Last Note
Prospects fou	und.			Person	nal Pr	rivate	Sched	uling /	Agency								
		4		Client II	D:		[A	uto]									
				First Na	ime:*			N	Middle:		Last:		S	uffix: Crede	ntials: 🛛 🕕		
				Address	s: • 2·												
				City:	52.			St	tate/Pr:			*	Posta	al Code:			_
				County:							~	Personal Em	ail:	Tooddo	Client Dre	anaat	
				Phone	es 📘							Tip: dbl-click	line iter	click on	the Add bi	utton	
				Prior	Prior Name Number I						Memo under the Prospect					s tab.	
				No phones found.									Save.				
																	_
				Referra	I Source:	-						· ·	Refe	rral Date:			
				Home \	/isit								Cond	ducted Date:			
				* requir	ed 🏦 re	ad only											
									Save	Save &	Close	Cancel					
					_	_	_	_					_]	



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

	CareWhen?					Assur	iCare						
	Home Scheduler Clients	rs Reports	Task	s Messages	s Setting	ıs Help							
	Client Prospect 2												
	4 Search: Names, cities, pho	Edit Client Pros	pect Rec	ord [Evan Pros	spect]					© 8	С ^ф		
	Last Name 🕇 🛛 First 🕇	Personal P	rivate	Scheduling	Agency	Contacts	Notes	Remir	nders Files History	iva	ted Last Note		
ł	Prospect Evan	Client ID:	20	[Auto]									
		First Name:*	Evan		Middle:		Last:	Prosp	ect Suffix: Crede	entials:			
		Address:						_	To convert a Pros	spect to an	active		
	6	City:			State/Pr:				Client, open the	or the			
		County:				✓ Personal		ersonal	Prospective Client.				
		Phones 📘						Tip: dbl	Clicking "Convert to Client" will				
		Prior Na	ime	Numb	ber	Memo			prompt you to en	nter all rema	aining		
		No phones found. entered, clic							ck Convert.				
								ા					
		Referral Source							▼ Referral Date:				
		Initial Contact:							 Contact Date: 				
		Conducted By:							Conducted Date:				
		* required 🇯 re	ead only										
				6	Convert t <u>o C</u>	lient Save	Save &	Close	Cancel				
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