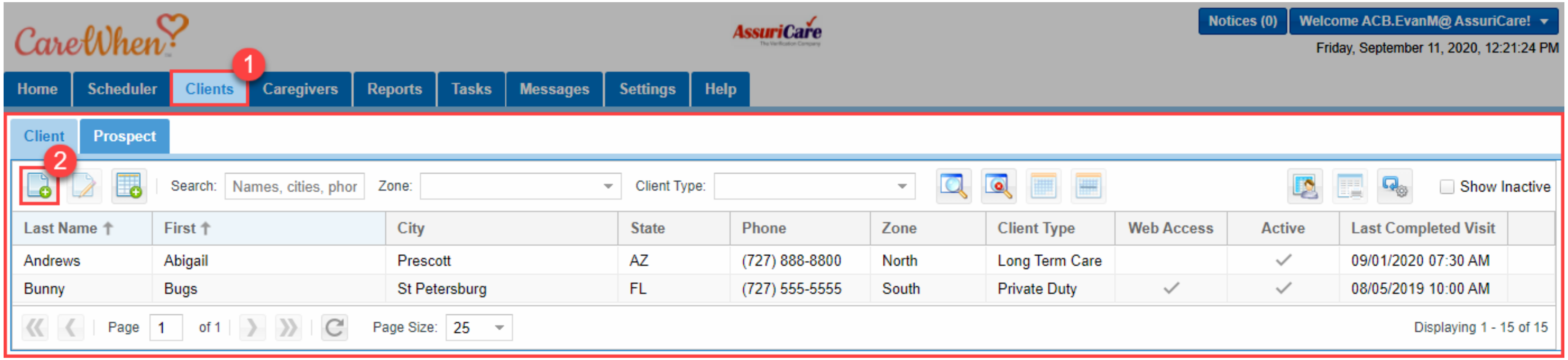
AssuriCare

CareWhen Training

Adding & Inactivating Clients

Adding a Client – Getting Started

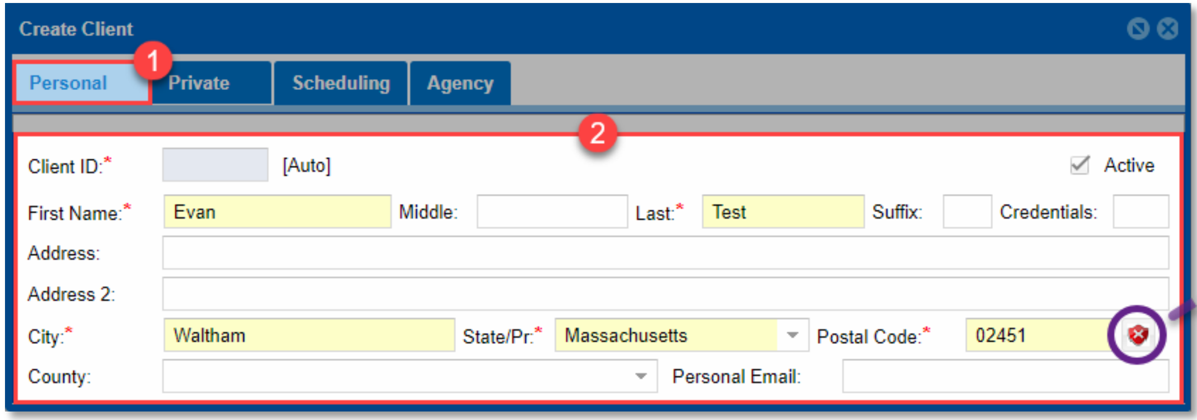
Adding a Client in CareWhen can be accomplished in a few simple steps. Start by selecting the Client tab. Once selected, click on the Plus button.



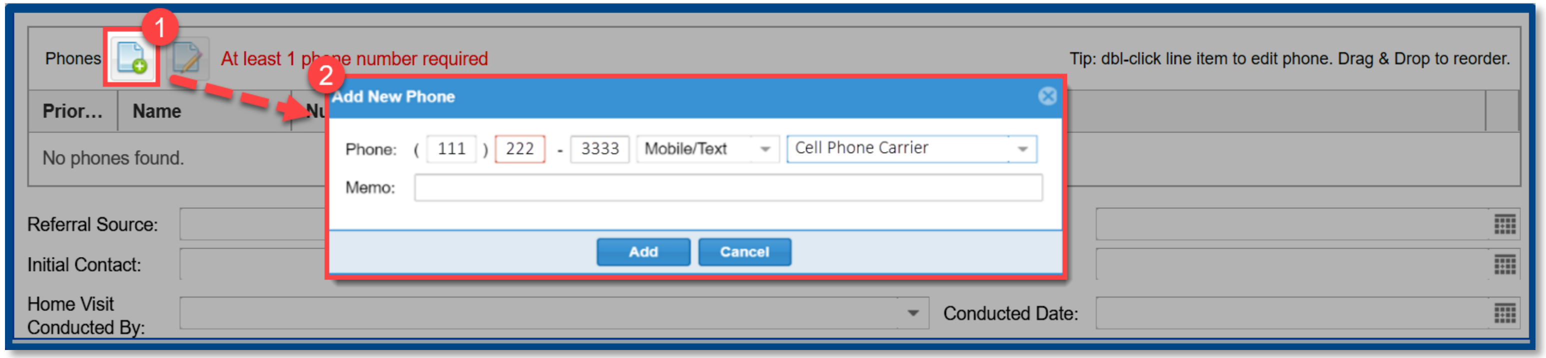
To learn how to set up the dropdown options for client tab fields, see the CareWhen Configuration training

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.



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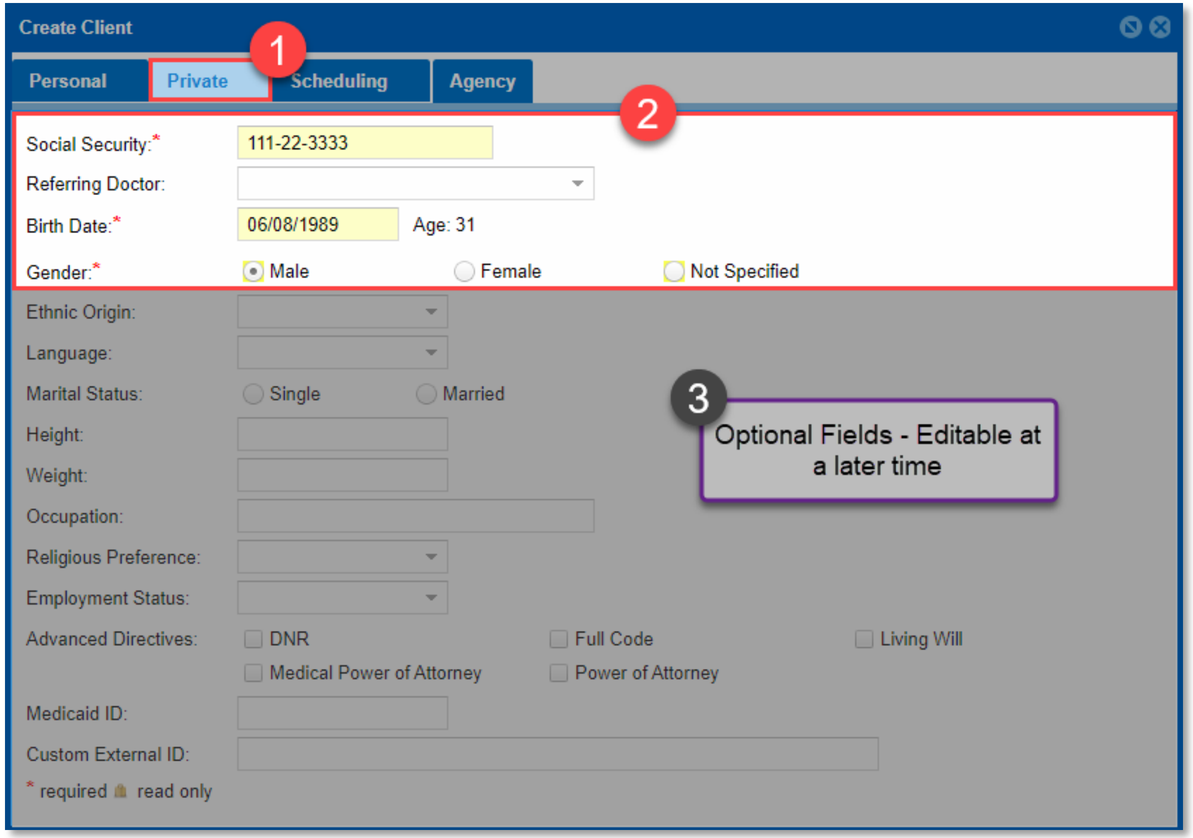
Adding a Client – Private Information

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.



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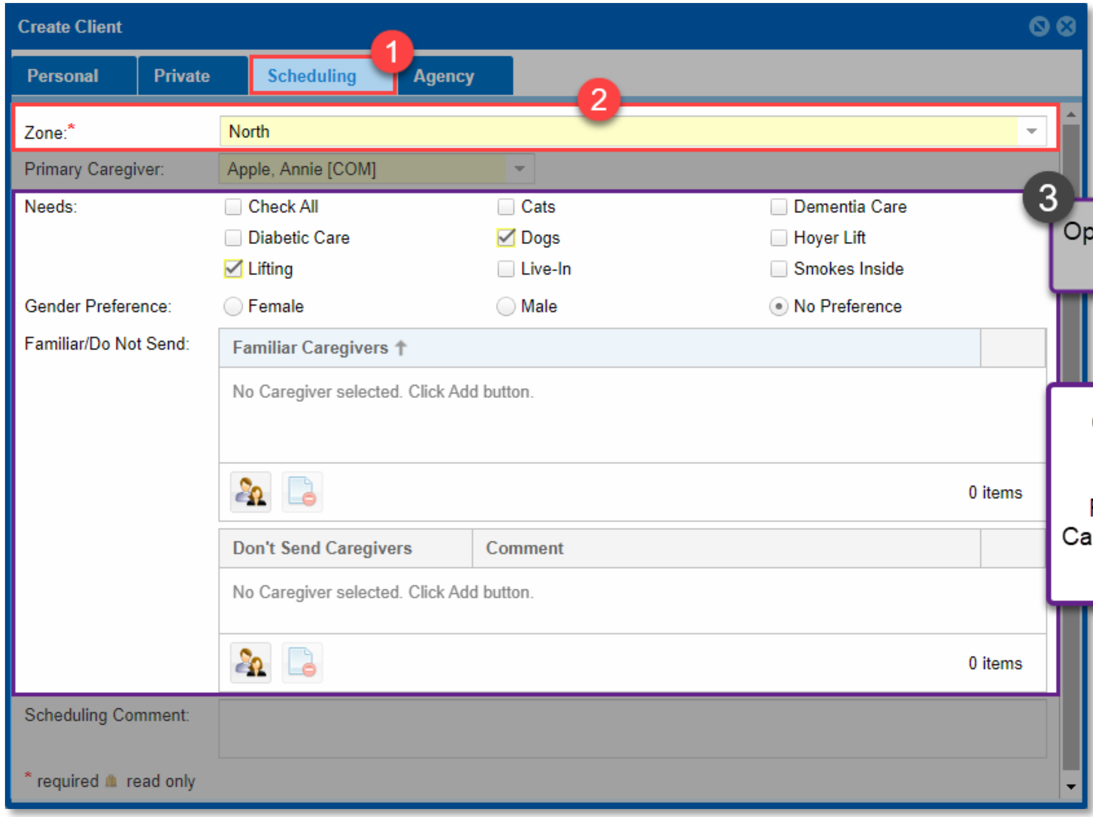
Adding a Client – Schedule Information

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

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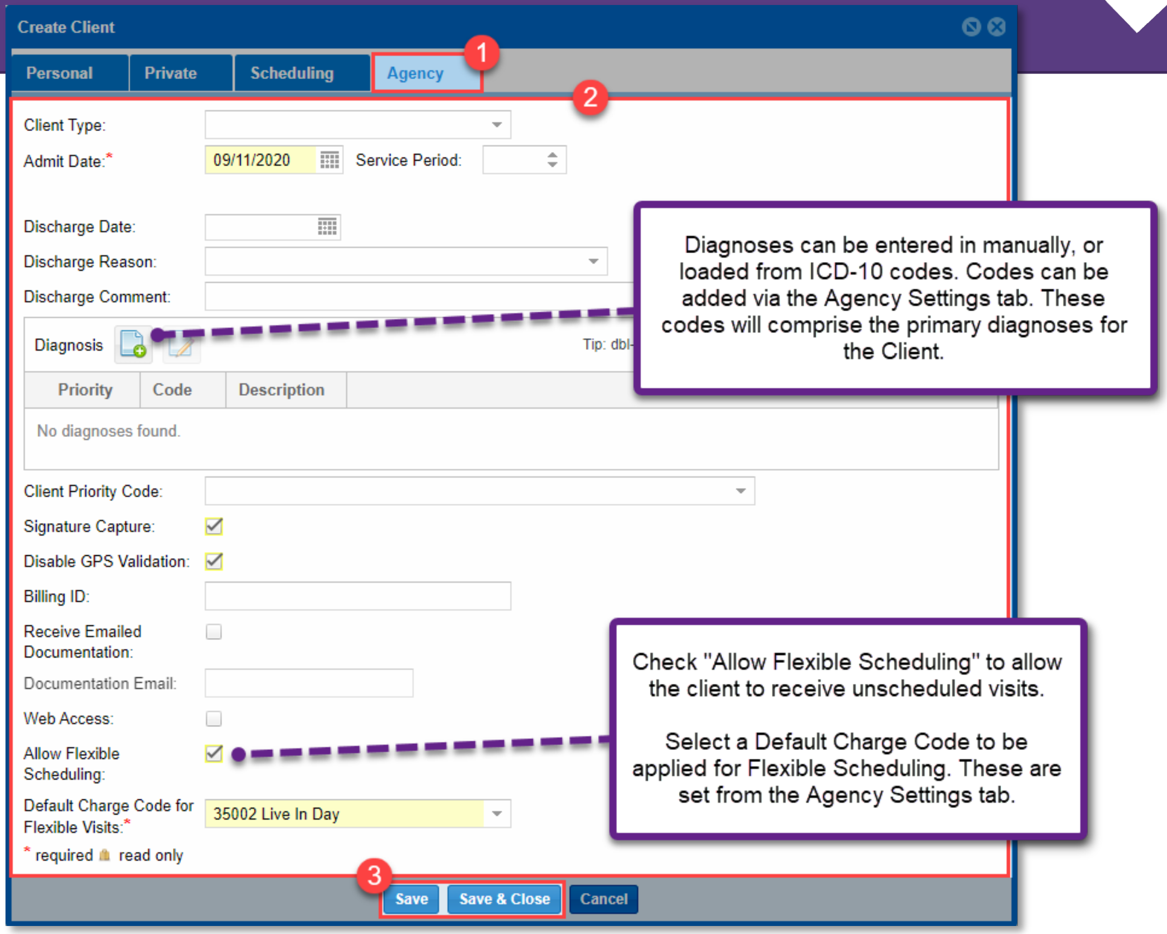
Adding a Client – Agency Information

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



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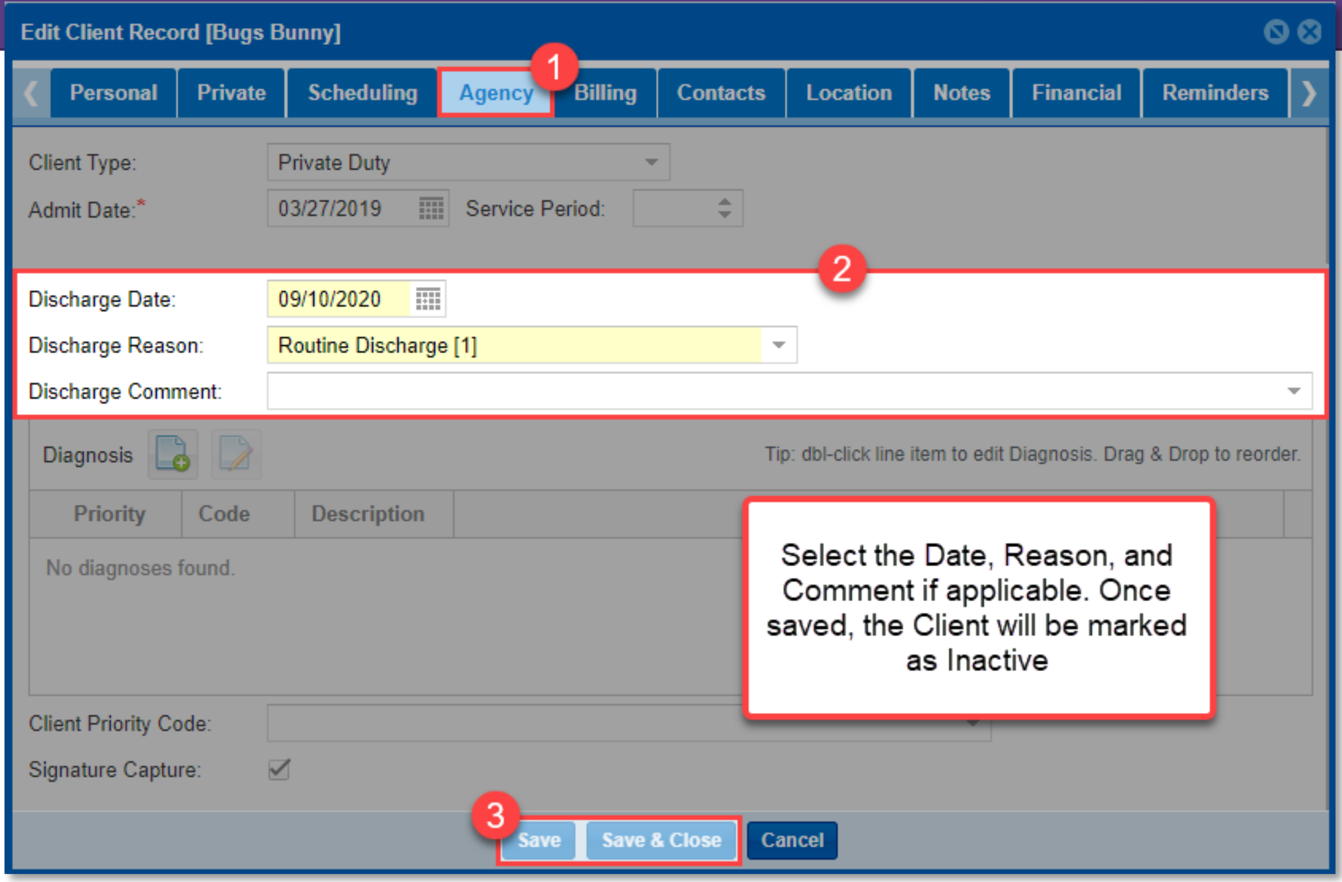
Inactivating a Client

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

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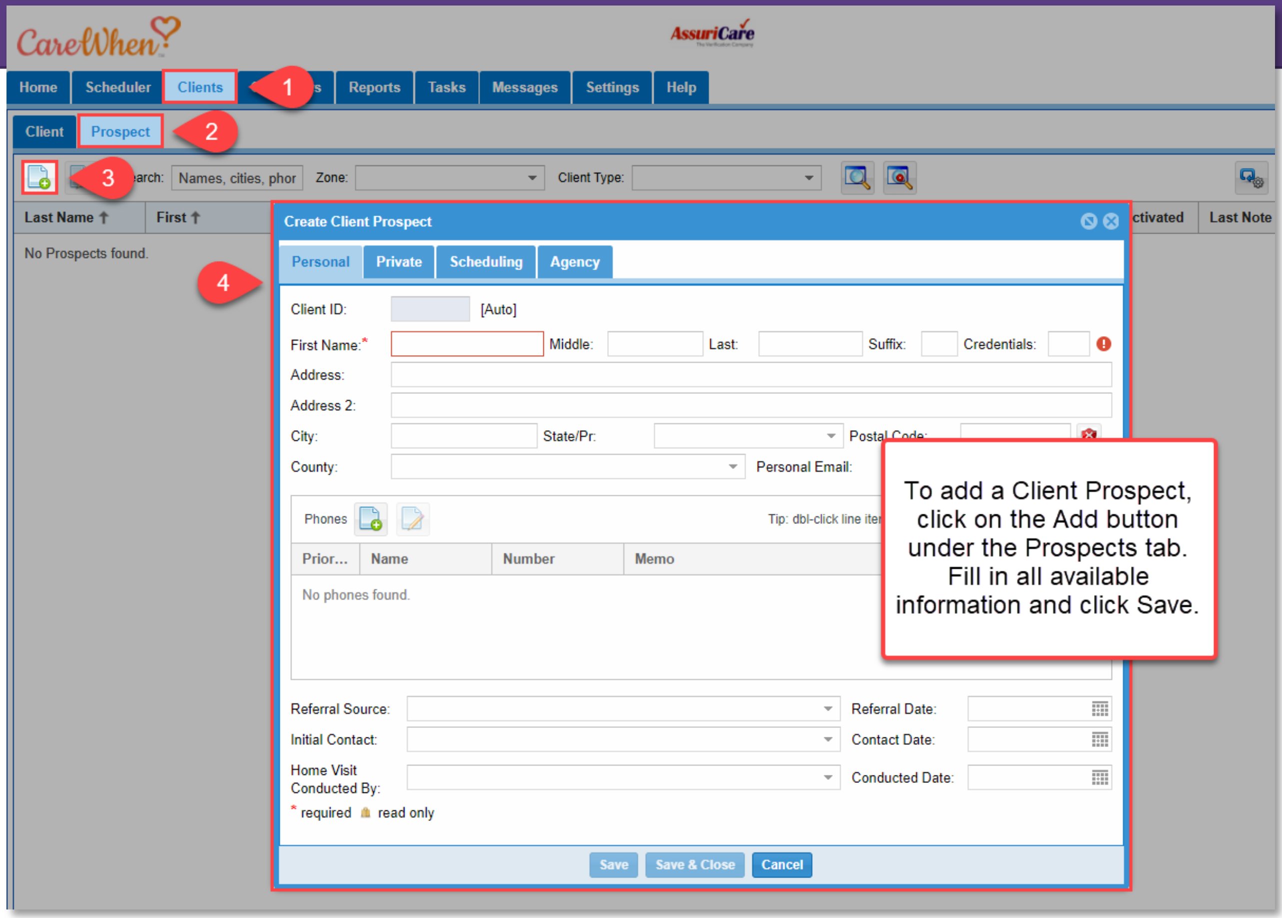
Creating Client Prospects

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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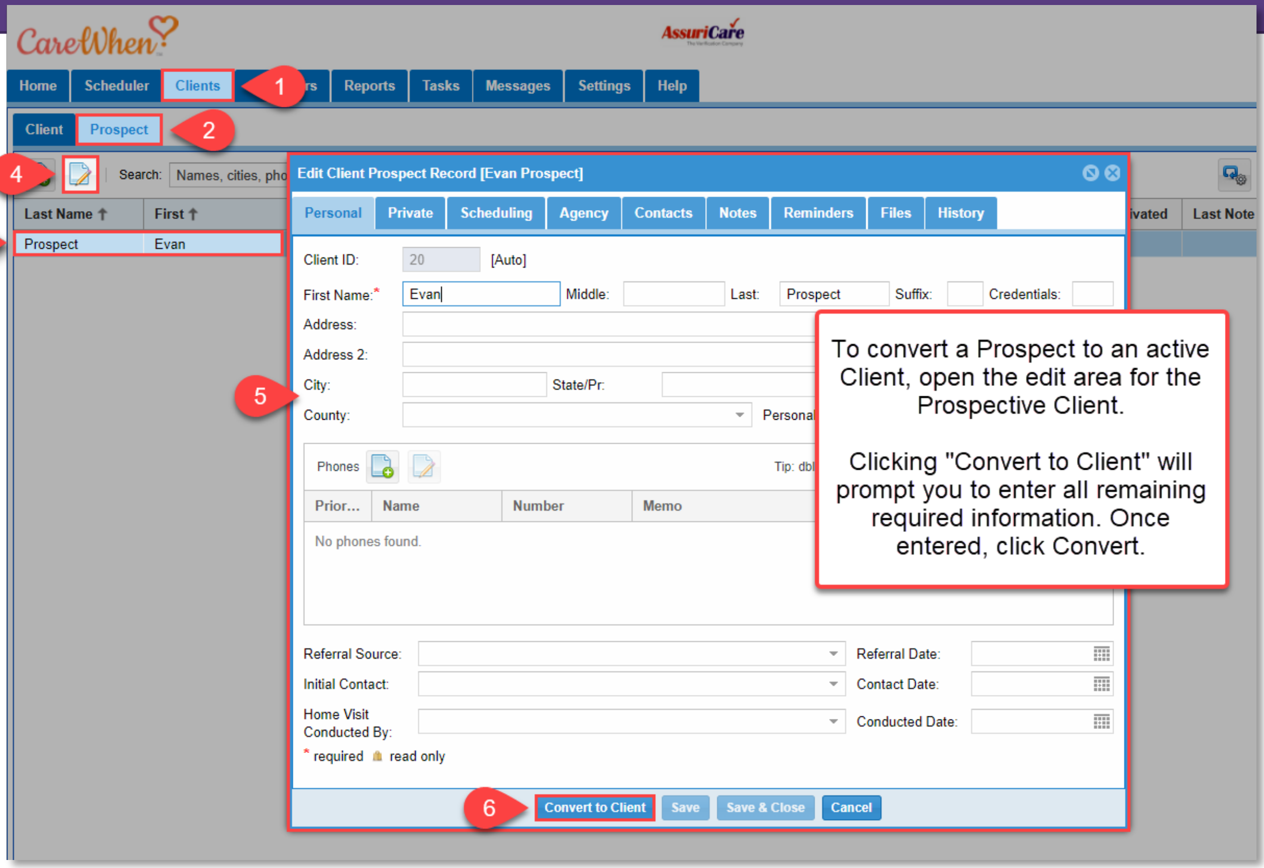
Converting Client Prospects to Active

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



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