CareWhen Training

Editing Clients

Editing a Client – The Basics

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

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

Editing a Client – The Basics

Once a Client has been added to CareWhen, there are many options available to help you edit their information and manage their account. The basics of the management functionality fall into four categories:

Edit Information

Update personal and private info
Manage contacts
Discharge clients

Scheduling

Set up orders
Establish client zones
Setup Pre-Authorizations

Billing

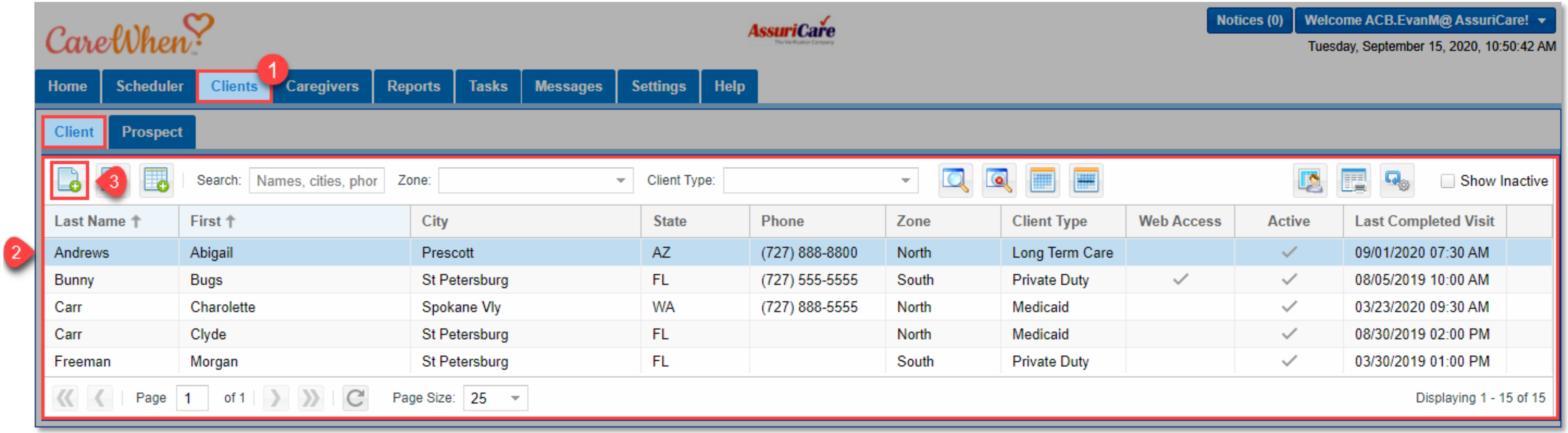
Set Client rates

Records

Set reminders
Add notes
Manage documents

Editing a Client – Getting Started

To access the editing options for a Client within CareWhen, navigate to the Clients tab, select the Client you'd like to manage, and then click the edit icon. Alternatively, Client names may be double clicked to open the edit functionality.



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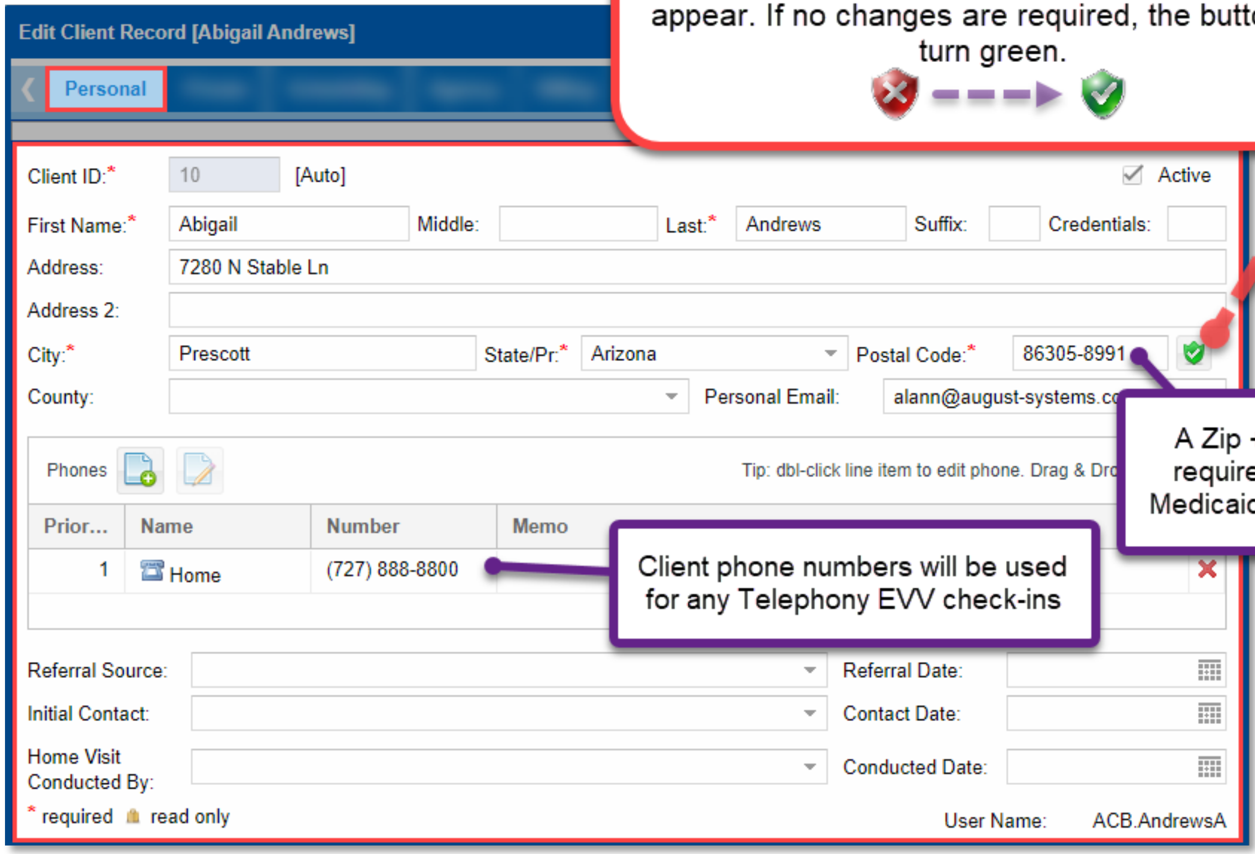
Editing a Client – Editing Information

Personal Information Tab

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

Common Actions:

- Updating a Client's address after a move
- Adding, removing, or updating a Client's phone information
  - Multiple numbers can be dragged and dropped in order of priority.
- Correct spelling issues



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.

A Zip + 4 is required for Medicaid Billing

Client phone numbers will be used for any Telephony EVV check-ins

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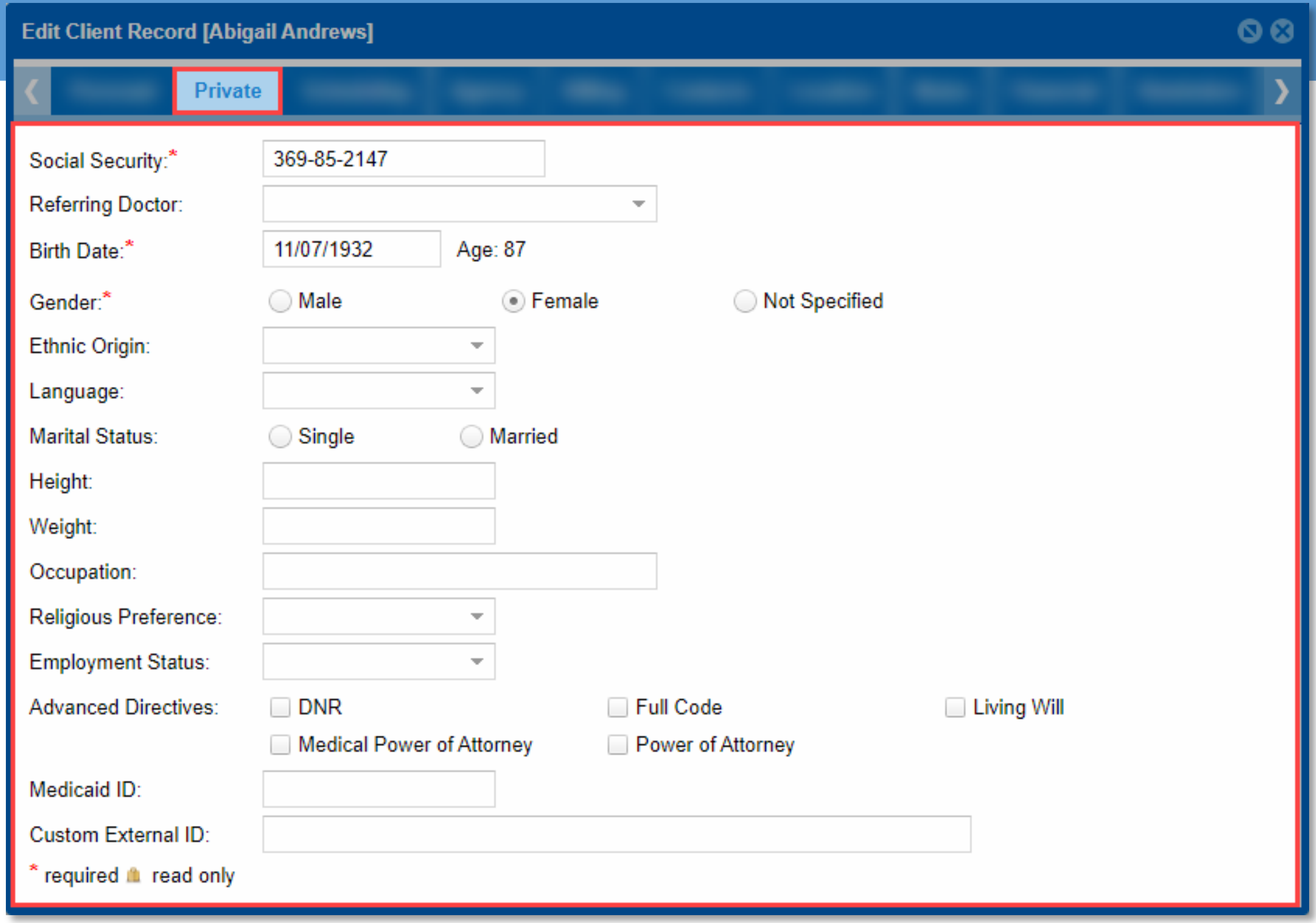
Editing a Client – Editing Information

Private Information Tab

Use the Private tab to edit a Client's secure information, such as SSN, birth date, and marital status.



Common Actions:

- Correcting issues with information entered during the Adding a Client process
- Adding Advanced Directives or a Medicaid ID, which is required for Medicaid Billing

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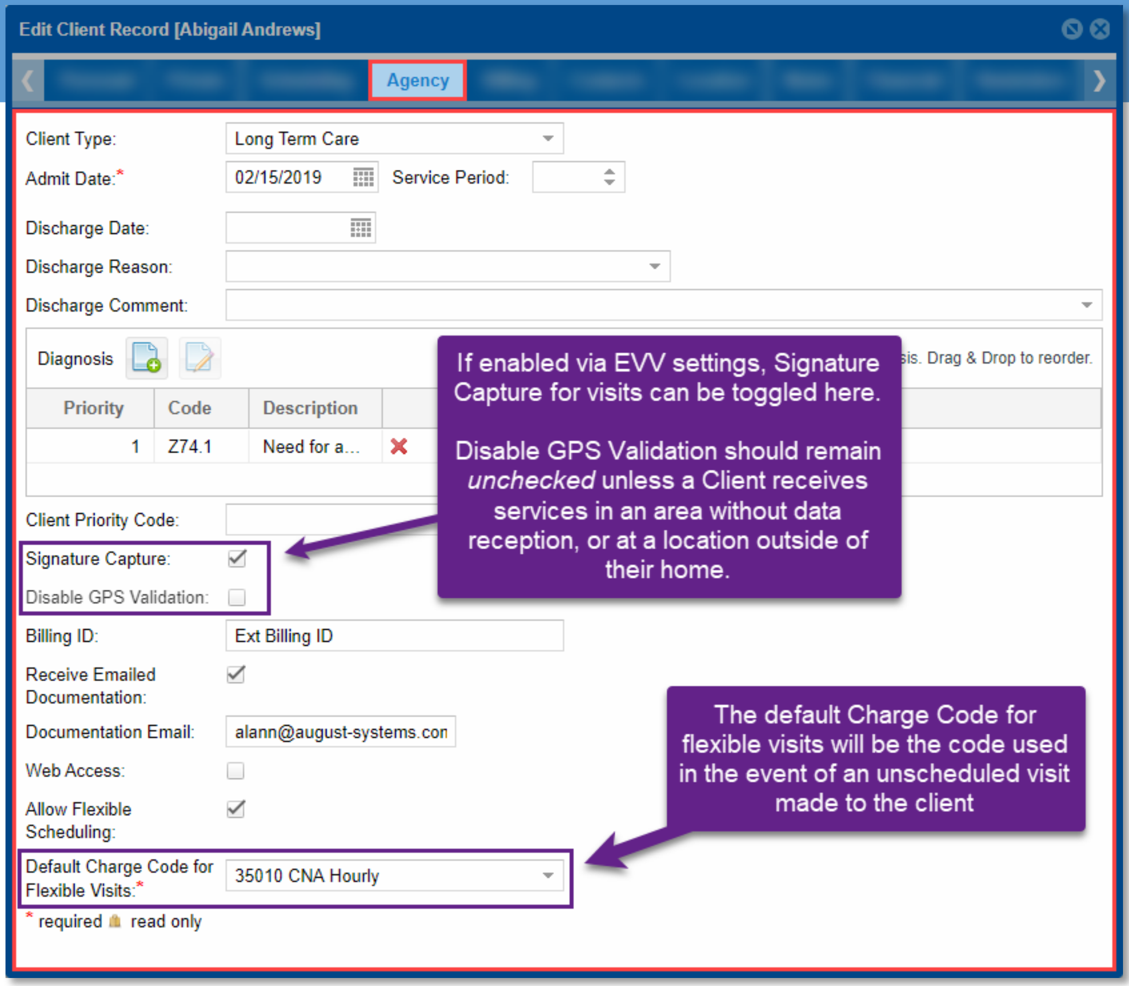
Editing a Client – Editing Information

Agency Tab

Use the Agency tab to edit a Client's Agency status. This page is primarily used to discharge a client, but also contains toggles for EVV specific features such as Signature Capture and GPS Validation.

Common Action:

- Discharge a client and input discharge specifics
    - Once a Discharge date and reason is entered, the client will be marked as inactive. Make sure that all visits are complete and paid before making a client inactive.



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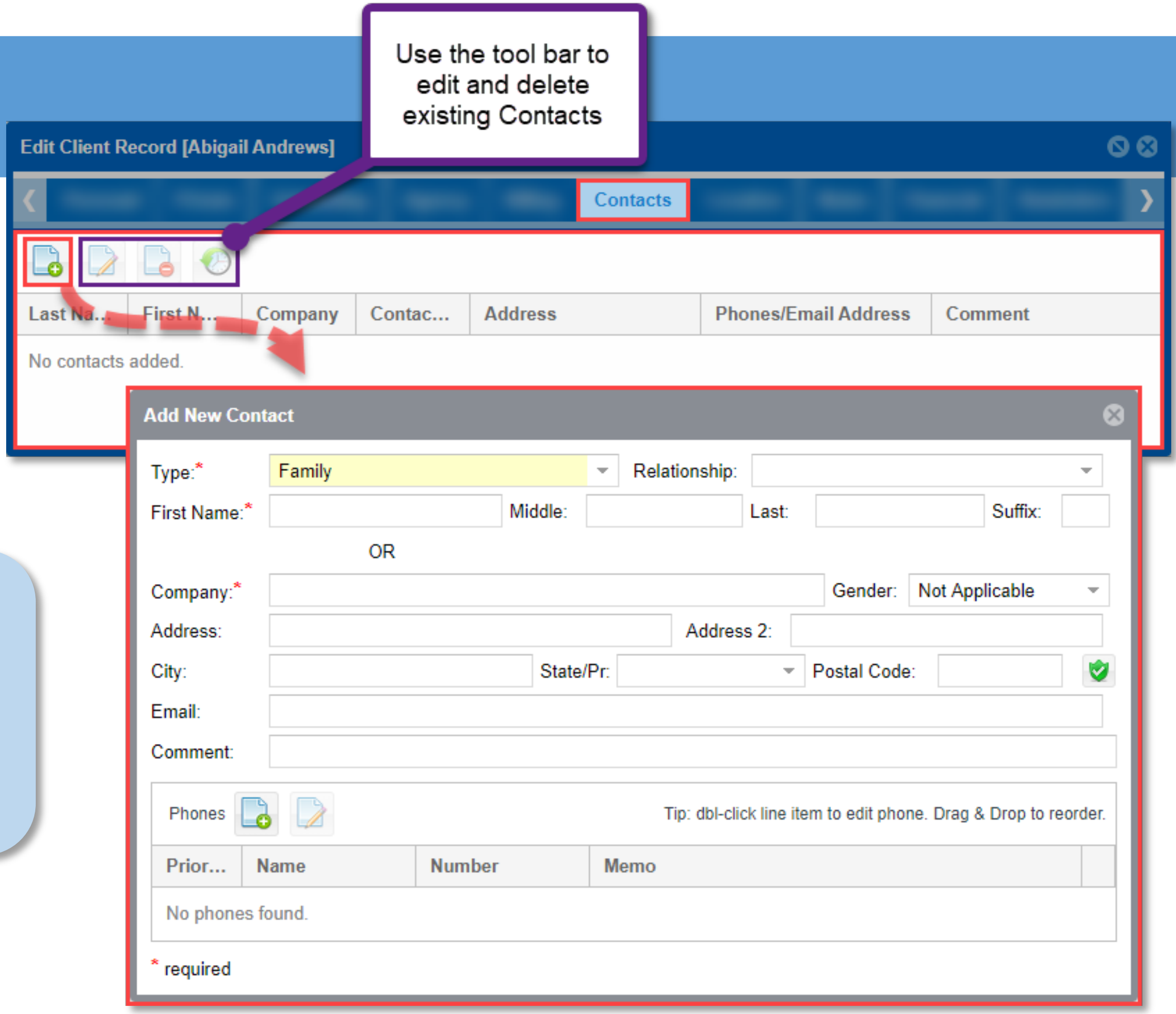
Editing a Client – Editing Information

Contacts Tab

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



Common Actions:

- Add new primary contacts to the Client's account

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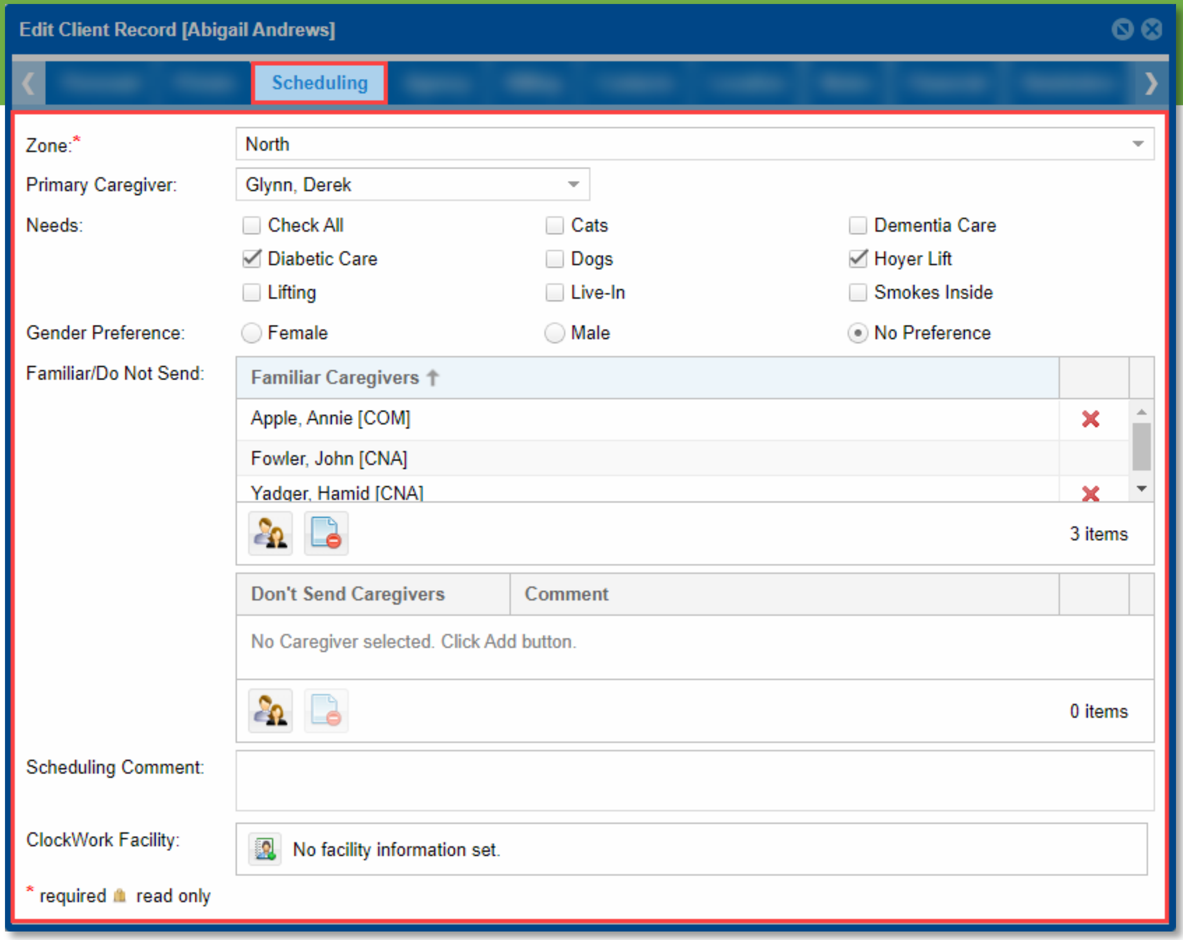
Editing a Client – Scheduling

Scheduling Tab

Use the Scheduling tab to edit information relating to a Client's scheduling parameters, such as their Zone designation.

Common Actions:

- Modify the Client's Zone designation. Each client is assigned to one zone.
- Edit the Client's Needs. These will be used to match with Caregiver Skills.



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Editing a Client – Scheduling

Orders Tab

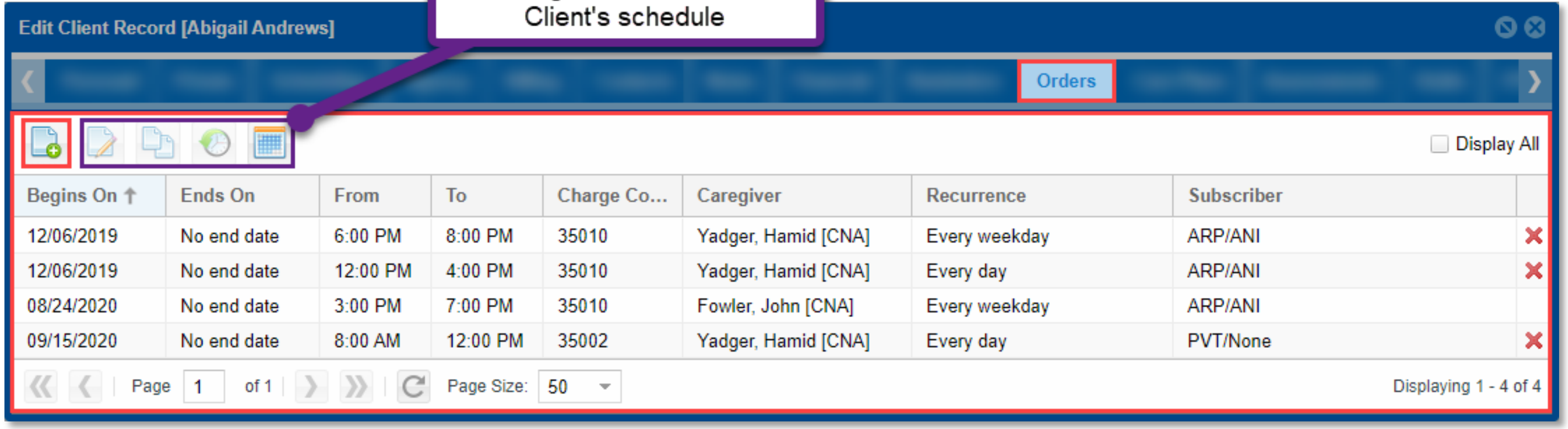
The Order tab can be used by an Agency to schedule one time, or recurring, visits pertaining to a Client. You may edit existing orders here, as well. See the *Creating & Managing Visits* training for in depth instructions to create and edit visits.

Common Action:

- Schedule appointments for a Client by selecting a start date, time, recurrence, and Caregiver. Make edits to the timing if necessary.

Note: Before creating an Order, ensure that your Charge Codes have been set.

Use the tool bar to place an order, copy an order, edit an existing order, or view the Client's schedule



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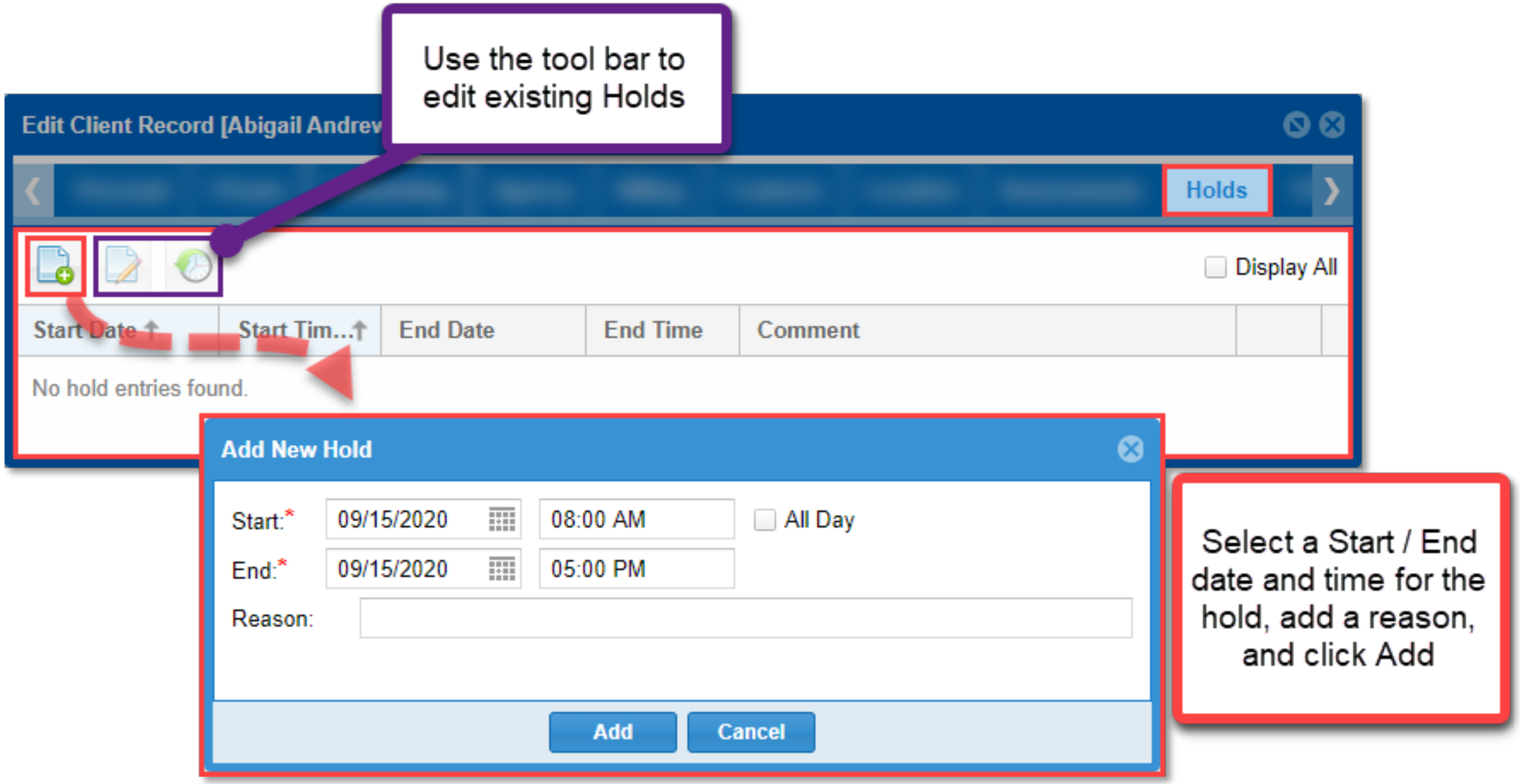
Editing a Client – Scheduling

Holds Tab

Use the Holds tab to add or edit scheduling holds for a particular Client. When a Client's schedule has a hold in place, you will be unable to schedule visits during the hold period.

Configuration Notes:

- When a Client's status is changed to "Hold", all visits during this time will display as purple under the Scheduler.



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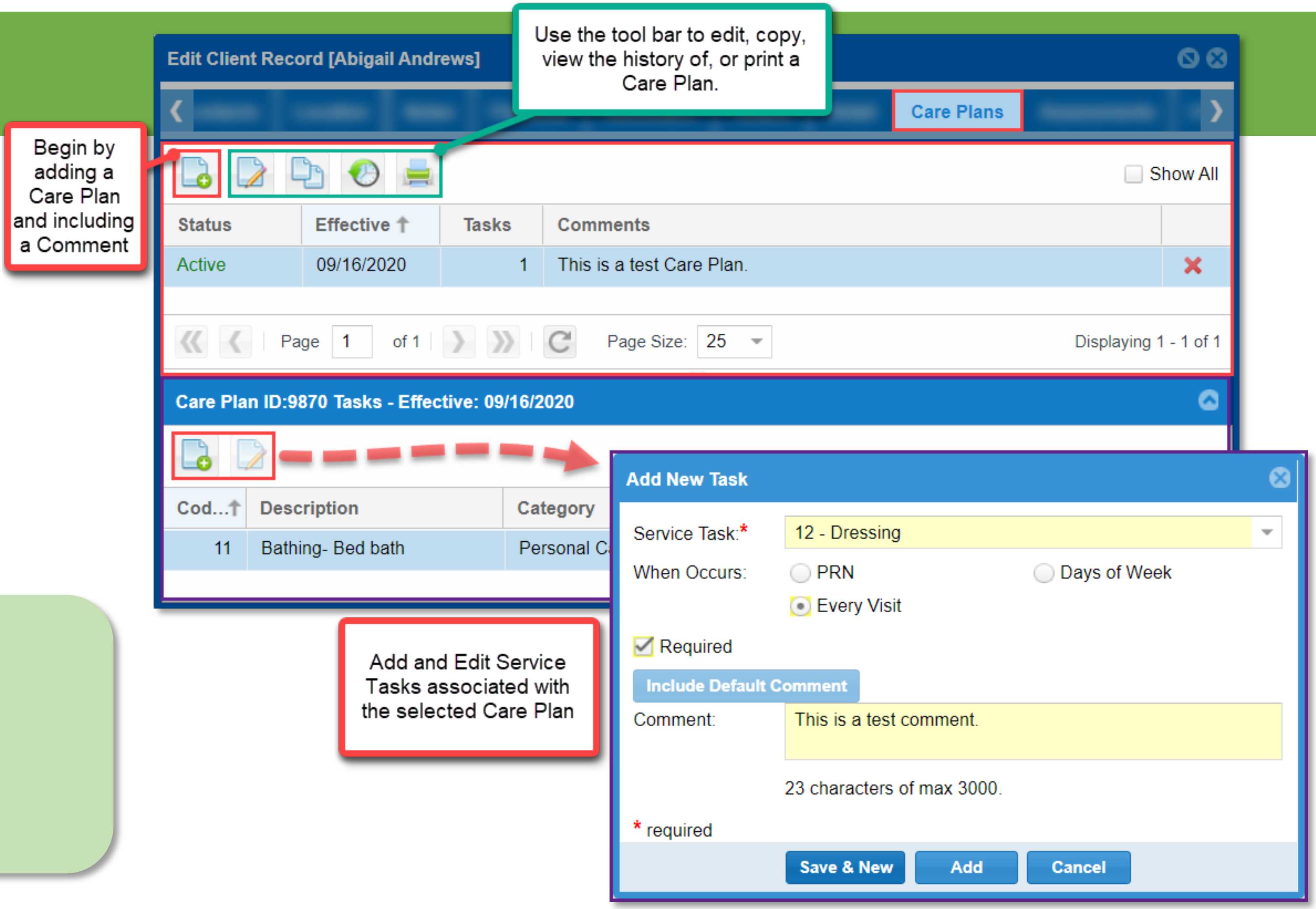
Editing a Client – Scheduling

Care Plans Tab

The Care Plans tab is where all tasks to be performed for the Client by the Caregiver can be input one at a time. Each item on Care Plan can be populated with Service Tasks. Items on a Care Plan can be added, deleted, or edited.



Common Actions:

- Indicate which tasks are to be performed when completing a visit.

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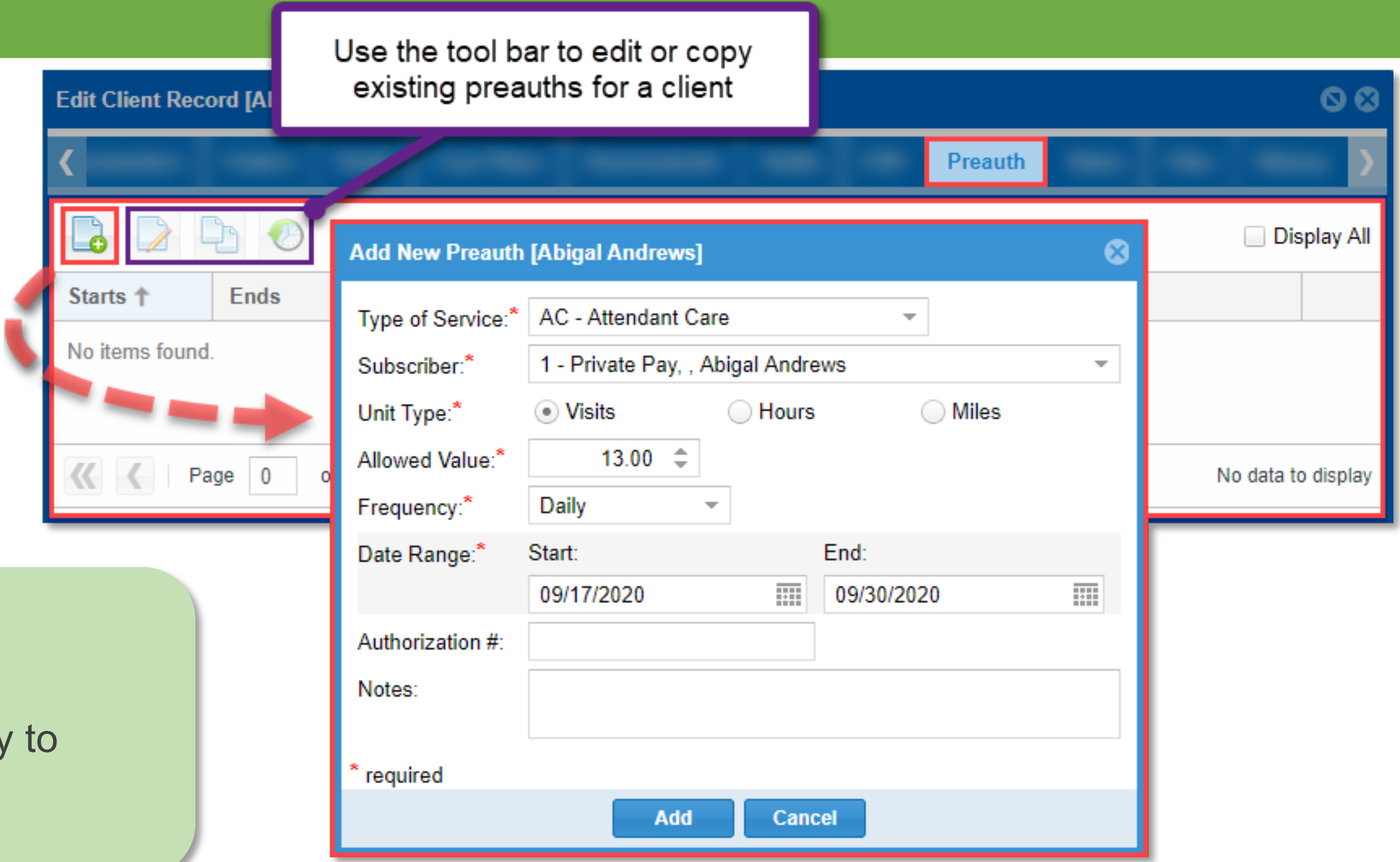
Editing a Client – Scheduling

Preauth Tab

The Preauth tab allows you to input pre-authorized care specifications for a Client. Preauth information is typically provided by an Insurance company and can be limited to set times and rates via the Add New Preauth area.



Configuration Note:

- Preauth's do not affect a Caregiver's ability to check in and check out for a visit.

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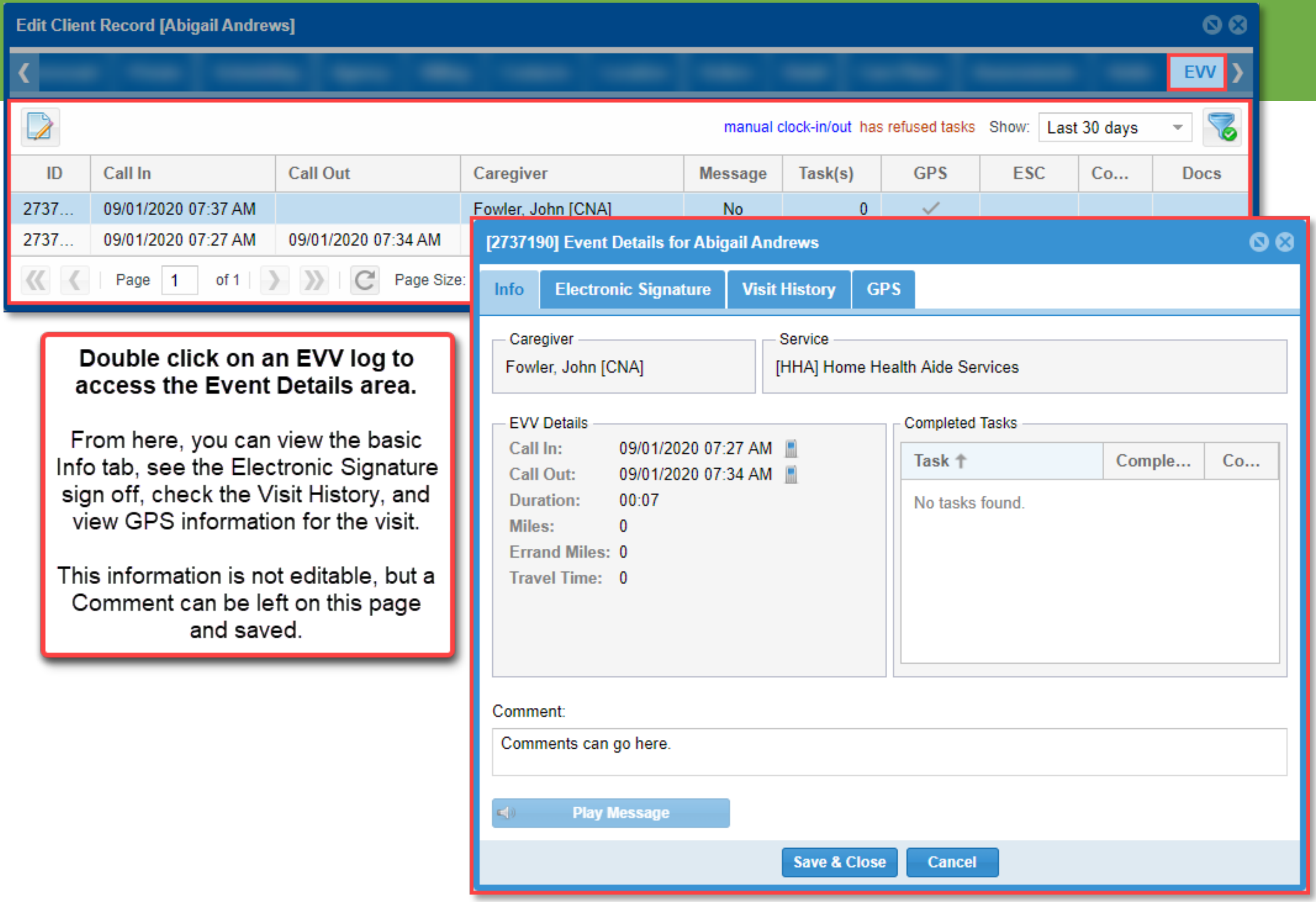
Editing a Client – Scheduling

EVV Tab

The EVV tab is used to view and edit information pertaining to a Client visit or telephony event, including details on check in / check out timing, electronic signature verification, visit history, and the GPS location.

Common Actions:

- View uploaded documents which have been sent to the CareWhen mobile app.



Double click on an EVV log to access the Event Details area.

From here, you can view the basic Info tab, see the Electronic Signature sign off, check the Visit History, and view GPS information for the visit.

This information is not editable, but a Comment can be left on this page and saved.

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Editing a Client – Billing

Rates Tab

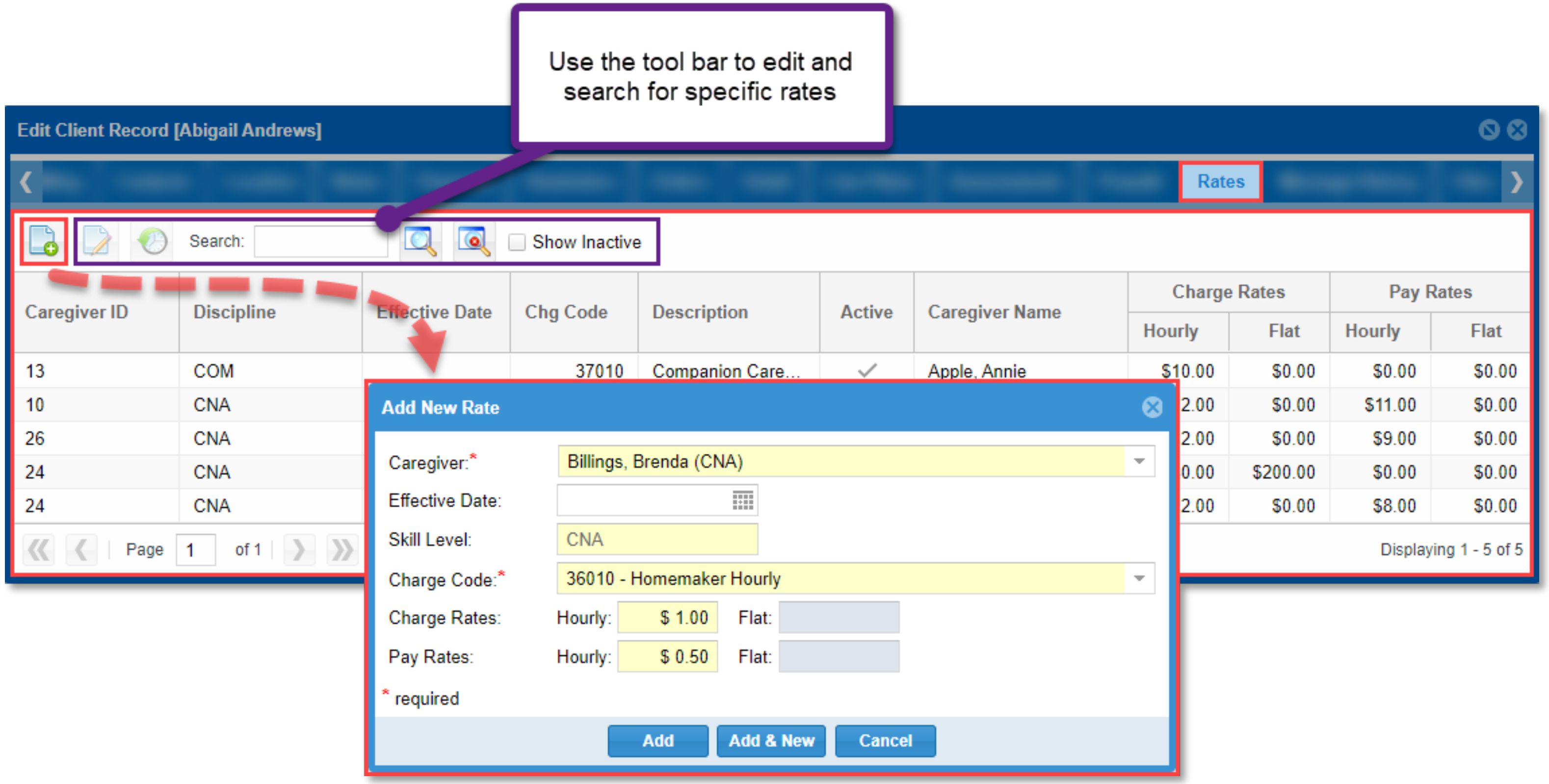
Configuration Notes:

- If an existing Client rate exists, and the defaults are changed upon placing an Order, a "Rate Modified" alert will be displayed.
    - This alert will give the option of updating the rate table to the new value for future uses.

The Rates tab is where an Agency can input rates that pertain to a specific client. These rates are pulled and set from a dropdown list of Charge Codes found in the Add dialogue.

To de-activate a rate, double click on an existing rate and un-check the Active box.

For information on how to setup Charge Codes and Rates, reference the CareWhen Foundations training.



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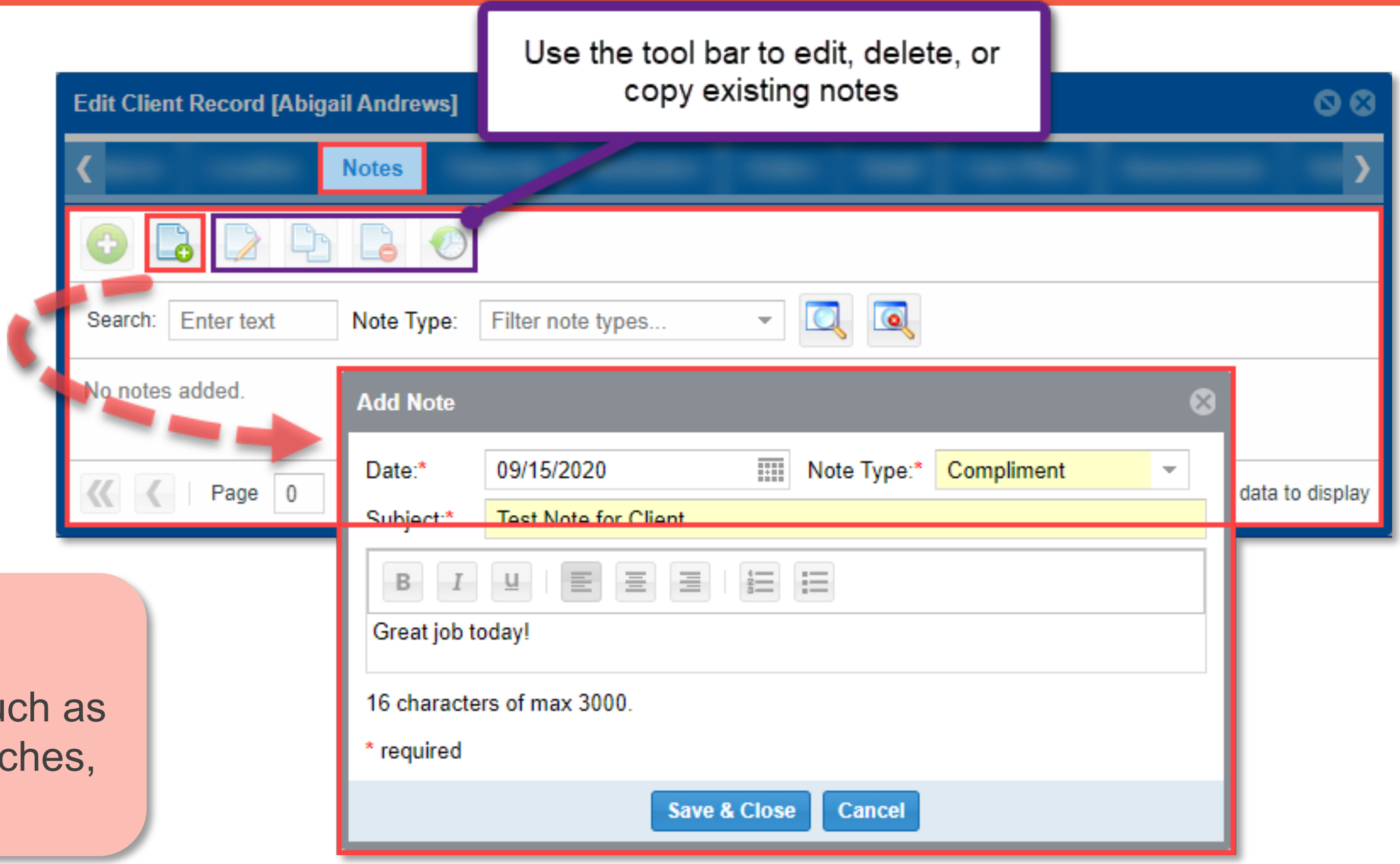
Editing a Client – Records

Notes Tab

The Notes tab provides an area to document changes and observations pertaining to a Client's account. New notes can be added at any time. This area is searchable via the search field beneath the options. See the *CareWhen Configuration* training for more information on setting up notes.



Common Action:

- Document common Client account updates, such as insurance information changes, Caregiver switches, and updated payment information.

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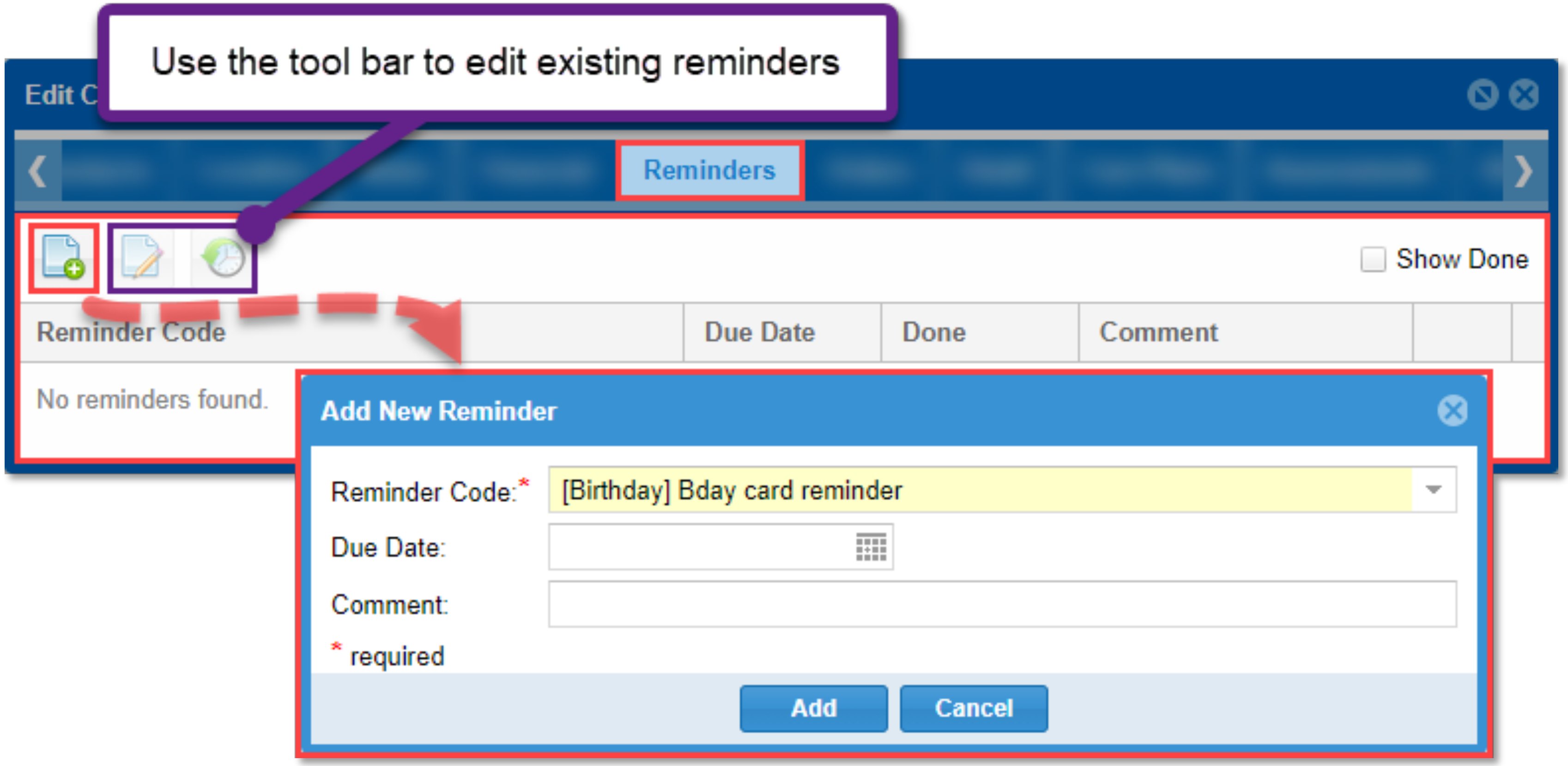
Editing a Client – Records

Reminders Tab

Common Action:

- Reminders are Commonly used for simple tasks such as weekly status updates and birthdays.

The Reminders tab can be used to log and edit reminders for a Client's case. Reminder selection options for this tab are set in the Agency Client Settings area. See the *CareWhen Configuration* training for more information on setting up reminder types.



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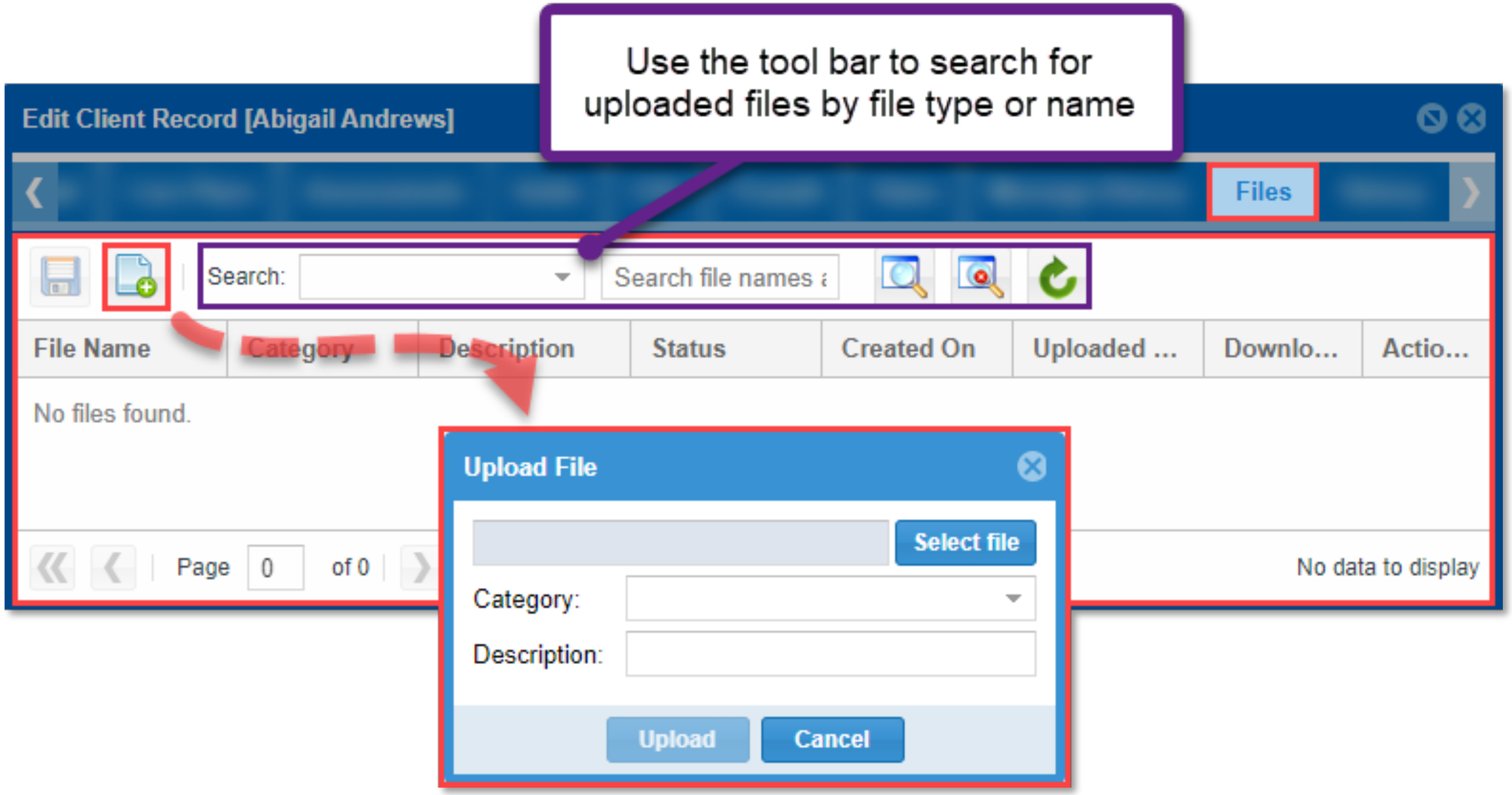
Editing a Client – Records

Files Tab

The Files tab is where an Agency can upload and store required files for a Client's case. 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 Action:

- Upload time sheets or new policy agreements



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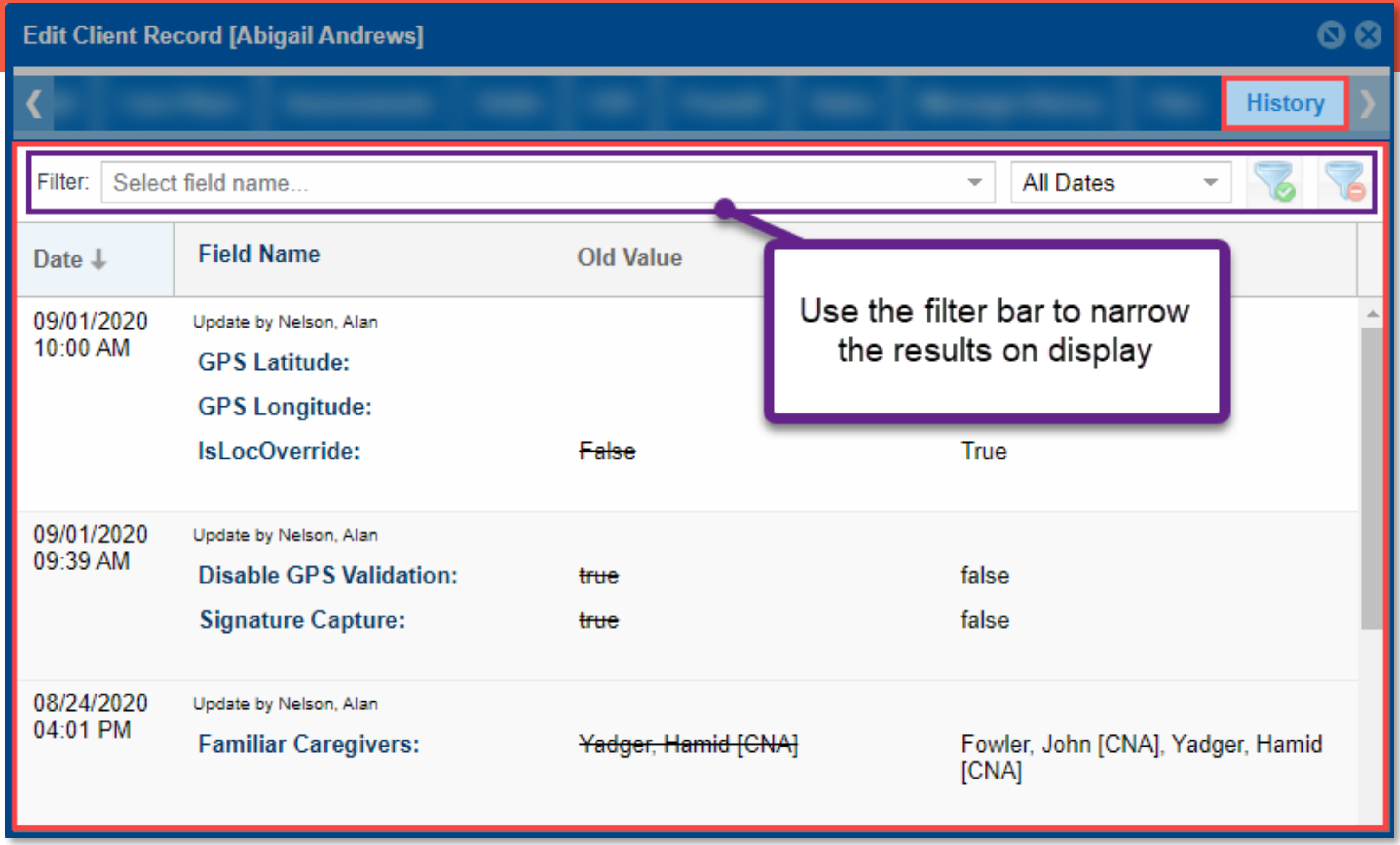
Editing a Client – Records

History Tab

The History tab serves as an audit log for the Client's case. This serves as a running record for any changes that have been made by the Agency, and any alterations to a Client's record will create a new entry in the History tab. These entries can be filtered for easier lookup and cannot be edited.

Common Action:

- View log entries to review when payment information was updated.



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