



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.

AssuriCare

Notices (0) Welcome ACB.EvanM@ AssuriCare! Tuesday, September 15, 2020, 10:50:42 AM

Home Scheduler **Clients** Caregivers Reports Tasks Messages Settings Help

Client Prospect

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
Carr	Charolette	Spokane Vly	WA	(727) 888-5555	North	Medicaid		✓	03/23/2020 09:30 AM
Carr	Clyde	St Petersburg	FL		North	Medicaid		✓	08/30/2019 02:00 PM
Freeman	Morgan	St Petersburg	FL		South	Private Duty		✓	03/30/2019 01:00 PM

Page 1 of 1 Page Size: 25 Displaying 1 - 15 of 15

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.

Address Validation

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

Prior...	Name	Number	Memo
1	Home	(727) 888-8800	

* required 📄 read only

User Name: ACB.AndrewsA

A Zip + 4 is required for Medicaid Billing

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

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

Edit Client Record [Abigail Andrews]

Private

Social Security:* 369-85-2147

Referring Doctor: [Dropdown]

Birth Date:* 11/07/1932 Age: 87

Gender:* Male Female Not Specified

Ethnic Origin: [Dropdown]

Language: [Dropdown]

Marital Status: Single Married

Height: [Text Box]

Weight: [Text Box]

Occupation: [Text Box]

Religious Preference: [Dropdown]

Employment Status: [Dropdown]

Advanced Directives: DNR Full Code Living Will
 Medical Power of Attorney Power of Attorney

Medicaid ID: [Text Box]

Custom External ID: [Text Box]

* required 📄 read only

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.

Agency

Client Type: Long Term Care

Admit Date: 02/15/2019 Service Period:

Discharge Date:

Discharge Reason:

Discharge Comment:

Priority	Code	Description
1	Z74.1	Need for a... X

Signature Capture:

Disable GPS Validation:

Billing ID: Ext Billing ID

Receive Emailed Documentation:

Documentation Email: alann@august-systems.com

Web Access:

Allow Flexible Scheduling:

Default Charge Code for Flexible Visits: 35010 CNA Hourly

* required 🏠 read only

If enabled via EVV settings, Signature Capture for visits can be toggled here.

Disable GPS Validation should remain *unchecked* unless a Client receives services in an area without data reception, or at a location outside of their home.

The default Charge Code for flexible visits will be the code used in the event of an unscheduled visit made to the client

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

Use the tool bar to edit and delete existing Contacts

Contacts

Last Nu...	First N...	Company	Contac...	Address	Phones/Email Address	Comment
No contacts added.						

Add New Contact

Type: Relationship:

First Name: Middle: Last: Suffix:

OR

Company: Gender:

Address: Address 2:

City: State/Pr: Postal Code:

Email:

Comment:

Phones

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

Prior...	Name	Number	Memo
No phones found.			

* required

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.

Edit Client Record [Abigail Andrews]

Scheduling

Zone.*: North

Primary Caregiver: Glynn, Derek

Needs:

- Check All
- Diabetic Care
- Lifting
- Cats
- Dogs
- Live-In
- Dementia Care
- Hoyer Lift
- Smokes Inside
- No Preference

Gender Preference: Female Male

Familiar/Do Not Send:

Familiar Caregivers ↑		
Apple, Annie [COM]		✗
Fowler, John [CNA]		
Yadger, Hamid [CNA]		✗
3 items		

Don't Send Caregivers	Comment		
No Caregiver selected. Click Add button.			
0 items			

Scheduling Comment:

ClockWork Facility: No facility information set.

* required 📄 read only

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

Begins On ↑	Ends On	From	To	Charge Co...	Caregiver	Recurrence	Subscriber	
12/06/2019	No end date	6:00 PM	8:00 PM	35010	Yadger, Hamid [CNA]	Every weekday	ARP/ANI	✘
12/06/2019	No end date	12:00 PM	4:00 PM	35010	Yadger, Hamid [CNA]	Every day	ARP/ANI	✘
08/24/2020	No end date	3:00 PM	7:00 PM	35010	Fowler, John [CNA]	Every weekday	ARP/ANI	
09/15/2020	No end date	8:00 AM	12:00 PM	35002	Yadger, Hamid [CNA]	Every day	PVT/None	✘

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.

The screenshot shows the 'Edit Client Record' interface for 'Abigail Andrew'. The 'Holds' tab is selected. A toolbar contains icons for adding, editing, and deleting holds. A callout box points to the toolbar with the text 'Use the tool bar to edit existing Holds'. Below the toolbar is a table with columns: Start Date, Start Time, End Date, End Time, and Comment. The table currently displays 'No hold entries found.' An 'Add New Hold' dialog box is open, showing fields for Start (09/15/2020, 08:00 AM), End (09/15/2020, 05:00 PM), and Reason. A callout box points to the dialog with the text 'Select a Start / End date and time for the hold, add a reason, and click Add'. The dialog has 'Add' and 'Cancel' buttons.

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.

Begin by adding a Care Plan and including a Comment

Use the tool bar to edit, copy, view the history of, or print a Care Plan.

Status	Effective ↑	Tasks	Comments
Active	09/16/2020	1	This is a test Care Plan.

Cod...↑	Description	Category
11	Bathing- Bed bath	Personal C

Add and Edit Service Tasks associated with the selected Care Plan

Add New Task

Service Task:* 12 - Dressing

When Occurs: PRN Days of Week Every Visit

Required

Include Default Comment

Comment: This is a test comment.

23 characters of max 3000.

* required

Save & New Add Cancel

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.

The screenshot shows the 'Edit Client Record' interface with the 'Preauth' tab selected. A callout box points to the tool bar with the text: 'Use the tool bar to edit or copy existing preauths for a client'. The 'Add New Preauth' dialog box is open, showing the following fields:

- Type of Service: AC - Attendant Care
- Subscriber: 1 - Private Pay, Abigail Andrews
- Unit Type: Visits Hours Miles
- Allowed Value: 13.00
- Frequency: Daily
- Date Range: Start: 09/17/2020, End: 09/30/2020
- Authorization #: [Empty]
- Notes: [Empty]

* required

Buttons: Add, Cancel

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.

ID	Call In	Call Out	Caregiver	Message	Task(s)	GPS	ESC	Co...	Docs
2737...	09/01/2020 07:37 AM		Fowler, John [CNA]	No	0	✓			
2737...	09/01/2020 07:27 AM	09/01/2020 07:34 AM							

[2737190] Event Details for Abigail Andrews

Caregiver: Fowler, John [CNA] | Service: [HHA] Home Health Aide Services

EVV Details

Call In: 09/01/2020 07:27 AM
Call Out: 09/01/2020 07:34 AM
Duration: 00:07
Miles: 0
Errand Miles: 0
Travel Time: 0

Completed Tasks

Task ↑	Comple...	Co...
No tasks found.		

Comment: Comments can go here.

Buttons: Play Message, Save & Close, Cancel

Editing a Client – Billing



Rates Tab

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.

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.

Use the tool bar to edit and search for specific rates

Caregiver ID	Discipline	Effective Date	Chg Code	Description	Active	Caregiver Name	Charge Rates		Pay Rates	
							Hourly	Flat	Hourly	Flat
13	COM		37010	Companion Care...	✓	Apple, Annie	\$10.00	\$0.00	\$0.00	\$0.00
10	CNA						2.00	\$0.00	\$11.00	\$0.00
26	CNA						2.00	\$0.00	\$9.00	\$0.00
24	CNA						0.00	\$200.00	\$0.00	\$0.00
24	CNA						2.00	\$0.00	\$8.00	\$0.00

Displaying 1 - 5 of 5

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.

Use the tool bar to edit, delete, or copy existing notes

Search: Enter text Note Type: Filter note types...

No notes added.

Page 0

Add Note

Date:* 09/15/2020 Note Type:* Compliment

Subject:* Test Note for Client

Great job today!

16 characters of max 3000.

* required

Save & Close Cancel

Editing a Client – Records



Reminders Tab

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.

Common Action:

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

Use the tool bar to edit existing reminders

Reminders

Reminder Code	Due Date	Done	Comment
No reminders found.			

Add New Reminder

Reminder Code:* [Birthday] Bday card reminder

Due Date:

Comment:

* required

Add Cancel

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

Use the tool bar to search for uploaded files by file type or name

File Name	Category	Description	Status	Created On	Uploaded ...	Downlo...	Actio...
No files found.							

Page 0 of 0

No data to display

Upload File

Select file

Category:

Description:

Upload Cancel

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.

Date ↓	Field Name	Old Value	
09/01/2020 10:00 AM	Update by Nelson, Alan GPS Latitude: GPS Longitude: IsLocOverride:	False	True
09/01/2020 09:39 AM	Update by Nelson, Alan Disable GPS Validation: Signature Capture:	true true	false false
08/24/2020 04:01 PM	Update by Nelson, Alan Familiar Caregivers:	Yadger, Hamid [CNA]	Fowler, John [CNA], Yadger, Hamid [CNA]