



# CareWhen Training

Creating & Managing Visits

# Creating & Managing Visits

The slides in this presentation will show how to create and edit visits for clients, as well as how to find available caregivers and use the Scheduler.



*To learn how to set up schedule defaults and ClockWork / EVV settings, see the CareWhen Configuration training.*

*For instructions on charge codes, see the CareWhen Foundations training.*

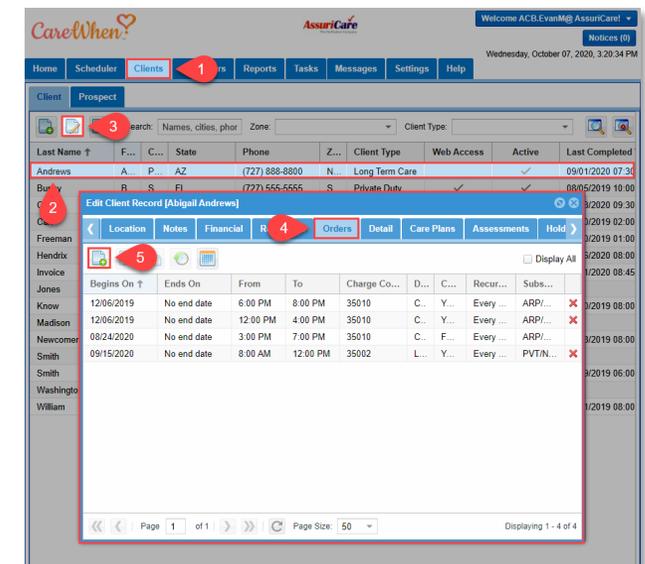
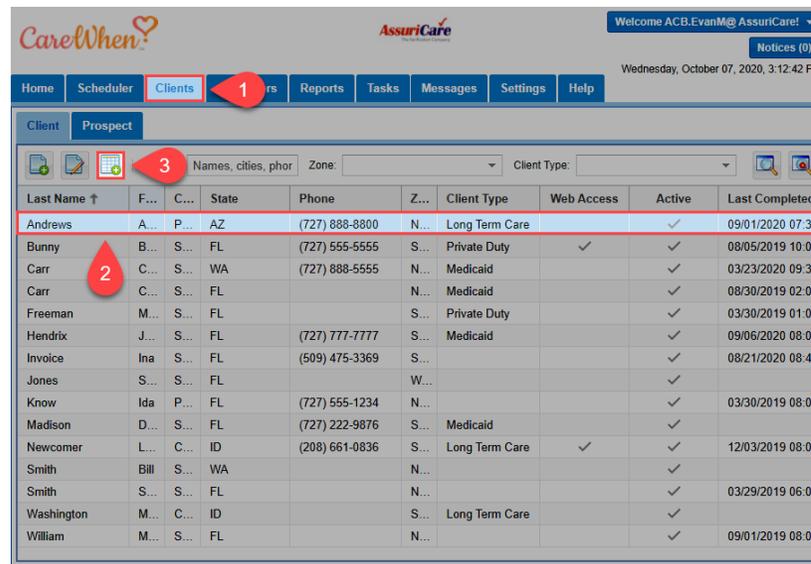
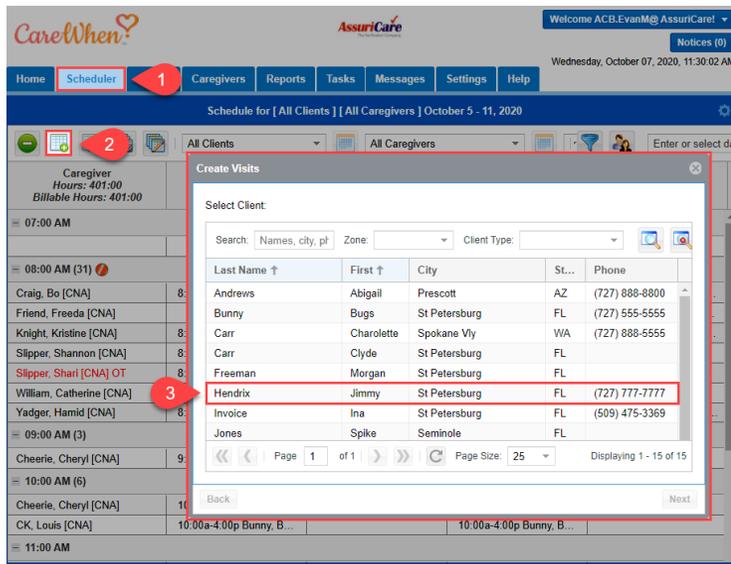
# Creating Client Visits

Agencies can set up client visits three different ways:

*Via the Scheduler*

*Via the Clients tab*

*Via the Orders tab in the Client Record*



# Creating Client Visits

Indicate the date type and complete the date, start time, and end time fields

**Create Visits for [Bunny, Bugs]**

Date Type:  Single 1  Multi

Start Date: 10/08/2020 2 Duration: 04:00 Start Time: 08:00 AM End Time: 12:00 PM

Recurrence 3

Daily  Every 1 day(s)  Weekly  Every weekday  Monthly  Yearly

No end date  End after: occurrences  End by:

**To create a single or recurring visit, select Single and input the start date, duration, end date / time. If applicable, check Recurrence and fill out the recurrence information. Click Next to continue**

4 Next

**Create Visits for [Bunny, Bugs] start on [10/8/2020]**

Date Type:  Single 2  Multi 1

Duration: 04:00 Start Time: 08:00 AM End Time: 12:00 PM 3

Selected Dates:  
Oct 07 2020 Oct 09 2020 Oct 10 2020 Oct 12 2020  
Oct 13 2020

**To create a visit with multiple dates, select Multi. Click the dates on the calendar and input the start and end times. Click Next to continue.**

**Note: Multi date visits selections can not have a recurrence.**

Back 4 Next

# Creating Client Visits

Select the appropriate charge code and then select the caregiver.

The Caregiver list that populates is based on the Skill Type required in the Charge Code.

Select the proper Subscriber, update the rates if needed, and click Finish.

Create Visits for [Bunny, Bugs] start on [5 dates] code [37010]

Select charge code: 37010 : Companion Care Hourly

Search: Companion   1

Charge Code	Description	Effective Date
37010	Companion Care Hourly	

2

Search for a Charge Code by description and select the code. Assign a Caregiver and, if applicable, select a different Subscriber (primary payor). Modify the rates if needed. Click Finish to continue.

The Client zone is: South

Assign Caregiver: Sunshine, Sally (CNA)\* 3

Subscriber:\* 1 - Private Pay, , Bugs Bunny

Charge Rate: Hourly: \$ 10.00

Pay Rate: Hourly: \$ 0.00

Lock Rates:

4

5

Back Finish

# Creating Rates for Each Client-Caregiver Relationship

To make scheduling easier, you can create a Rate between a particular caregiver and client before scheduling.

The rate is created on the Rates tab in the Client record.

**Edit Client Record [Abigail Andrews]**

Rates

Select the Caregiver and the Charge Code from the dropdown menus. Update the rates if needed.

Caregiver ID	Discipline	Effective Date	Chg Code	Companion Care...	Apple, Annie	Rates		
						Flat	Hourly	Flat
13	COM		37010		\$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

**Add New Rate**

Caregiver\*: Apple, Annie (COM)

Effective Date: [Calendar]

Skill Level: COM

Charge Code\*: 29001 - Mileage

Charge Rates: Hourly: [ ] Flat: \$ 10.00

Pay Rates: Hourly: \$ 0.00 Flat: [ ]

\* required

Add Add & New Cancel

The rates will populate based on the charge code selected. You can change the pre-populated rates to reflect the rates negotiated between the Client and Caregiver.

# Edit Client Visits

Once a visit is created, it can be edited from the Scheduler tab.

The scheduler can edit:

- Visit date
- Start / End time
- Assigned Charge Code
- Assigned Caregiver
- Visit Status
- Visit Comment
- If EVV events have been collected on this visit, the EVV GPS, and Electronic Signature information

**CareWhen** AssuriCare

Home **Scheduler** 1 Caregivers Reports Tasks Messages Settings Help

Schedule for [ All Clients ] [ All Caregivers ] October 5 - 11, 2020

All Clients All Caregivers All Zones Enter or select date

	Monday 10/5 79:00 79:00	Tuesday 10/6 44:00 44:00	Wednesday 10/7 79:00 79:00	Thursday 10/8 44:00 44:00	Friday 10/9 79:00 79:00
- 07					
- 08					
Craig	00p Hendrix, Ji...				
Frier					
Knig	30p Newcomer...				
Slipp	00p William, M...				
Slipp	00a Invoice, Ina				
Willia					
Yadc	00p Andrews, ...				
- 09:00 AM (3)	Cheerie, Cheryl [CNA]	2 9:00a-10:00a Carr, Ch...			
- 10:00 AM (6)	Cheerie, Cheryl [CNA]	10:00a-11:30a Carr, Ch...			
	CK, Louis [CNA]	10:00a-4:00p Bunny, B...			
- 11:00 AM					
- 12:00 PM (7)					

**Edit Visit for [Carr, Charlotte] start on [Mon 10/5/2020 9:00 AM] code [36011]**

Visit Details Visit History Client Or...

Client: Carr, Charlotte Subscriber: MPC/M...

Visit Start: 10/05/2020 Duration: 01:00 Start Time: 09:00 AM End Time: 10:00 AM

Charge Code: 36011 : Personal Care Hou... Client Zone: North **Show Codes**

Subscriber\*: 3 - Medicaid PC, MDC - Medicaid, Charlotte Carr

Assign Caregiver: Cheerie, Cheryl (CNA)

Visit Status: Ok

Comment: Type a short comment...

Charge Rate: Hourly: \$ 12.00

Pay Rate: Hourly: \$ 0.00

Lock Rates:

**Save & Close** **Cancel**

To edit a single visit from the Scheduler tab, double click on the visit.

You can change the date, time, or charge code, as well as the assigned Caregiver, visit status, or Subscriber.

If this is a recurring series of visits, changing the Caregiver for a single visit **will not** change the Caregiver for all visits in the series.

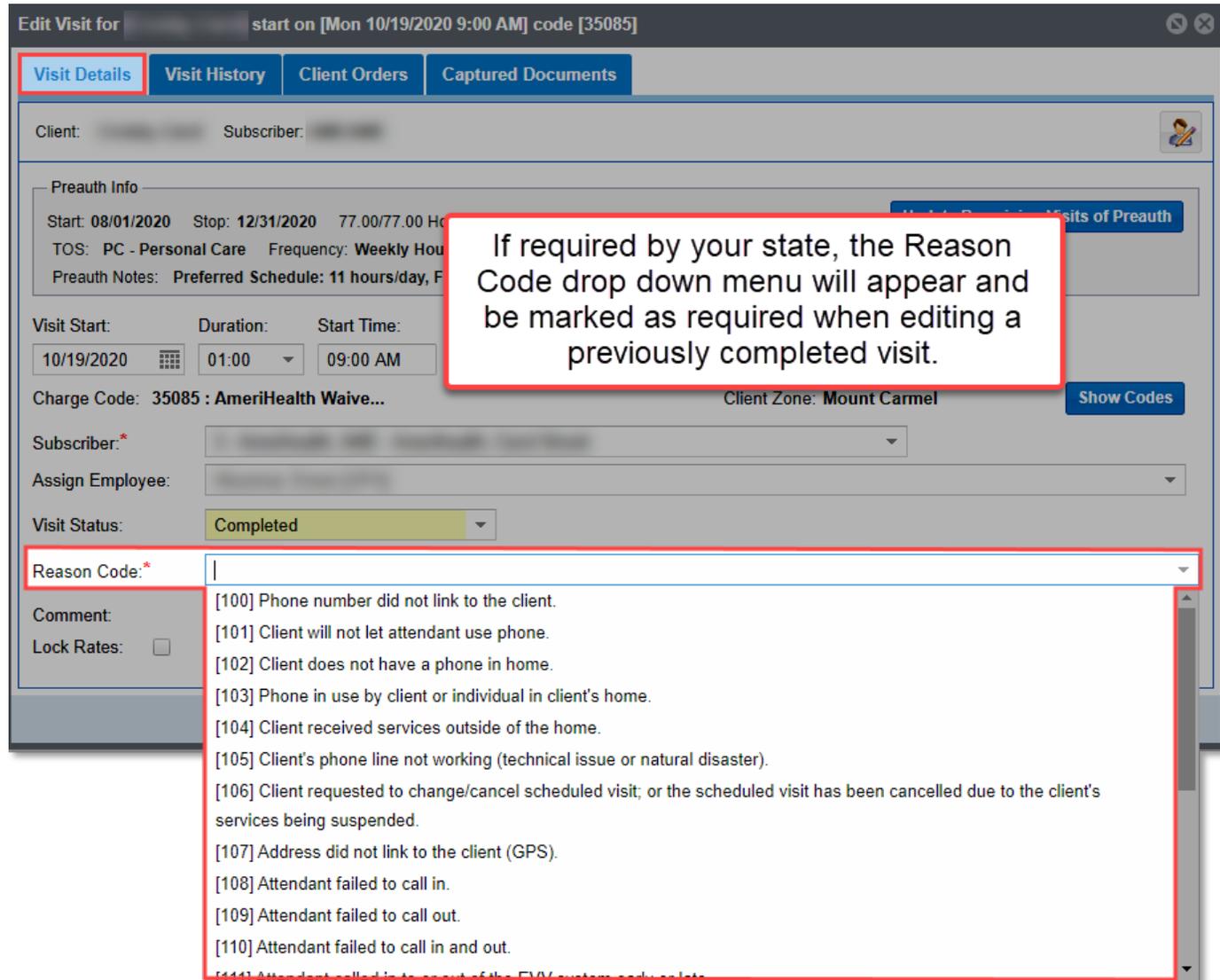
To change the Charge Code, click Show Codes and select a new one. This will change the Caregiver list for the Assign Caregiver drop down.

If desired, input specific comments pertaining to an individual visit.

# Edit Client Visits – Reason Codes

When manually altering completed visits, some states require the use of a Reason Code to specify the reasoning for the change. If your state requires this, the Reason Code drop down will be enabled for your Agencies version of CareWhen.

The dropdown menu will populate based on state-specific reason codes that have been hardcoded into CareWhen.



# Edit Client Visits

You can also edit a visit from the Orders tab of the Client record. Note that if an order has completed visits associated with it, the order can not be edited. A new order would have to

The screenshot shows the 'Edit Client Record [Abigail Andrews]' interface. The 'Orders' tab is selected, indicated by a red circle '1'. A callout box states: 'On the Client Record, click on the Orders Tab, select the order you would like to edit, and click the Edit icon.' The 'Orders' table has a red circle '2' over the first row. A red circle '3' highlights the 'Edit' icon in the toolbar. A second callout box states: 'On the Client Record, click on the Orders Tab, select the order you would like to edit, and click the Edit icon.' Below the table, two pop-up windows are shown. The first, 'Edit Visits for [Andrews, Abigail] code [35010]', has a red circle '4' and shows fields for Start Date (12/06/2019), Duration (02:00), Start Time (06:00 PM), and End Time (08:00 PM). It also has a 'Recurrence' section with options for Daily, Weekly, Monthly, Yearly, and Every weekday. The second pop-up, 'Edit Visits for [Andrews, Abigail] start on [12/6/2019] code [35010]', has a red circle '5' and shows a list of charge codes with '35010 : CNA Hourly' selected. It also shows fields for Assign Caregiver (Yadger, Hamid (CNA)\*), Subscriber (5 - AARP LTC, ANI - All Nations Insurance, Abigal Andrews), Charge Rate (\$12.00), and Pay Rate (\$9.00).

Begins On ↑	Ends On	From	To	Charge Code	C..	Y...	Every ...	ARP/...	
12/06/2019	No end date	6:00 PM	8:00 PM	35010	C..	Y...	Every ...	ARP/...	✖
12/06/2019	No end date	12:00 PM	4:00 PM	35010	C..	Y...	Every ...	ARP/...	✖
08/24/2020	No end date	3:00 PM	7:00 PM						
09/15/2020	No end date	8:00 AM	12:00 PM						

AssuriCare

# Create a Visit with No Assigned Caregiver

If you do not know which caregiver will be assigned to the visit, you can create a visit without assigning a caregiver.

To do so, start a new visit and click either Use / Update Existing Rate or Create New Rate (either option works). Then select the appropriate code and click Finish.

To create a visit with no assigned Caregiver, select a Charge Code, leave the Caregiver selection as "I will assign later", alter the Subscriber and Rate selections if needed, and click Finish.

Create Visit for [Andrews, Abigail] start on [10/9/202

Select charge code: 35010 : CNA Hourly

Search:

Charge Code	Description	Effective Date
33010	Skilled Nursing- SN	
35002	Live In Day	
35010	CNA Hourly	
35011	CNA PC	
36010	Homemaker Hourly	
36011	Personal Care Hourly	
37010	Companion Care Hourly	

The Client zone is: North

Assign Caregiver: I will assign later

Subscriber.\* 1 - Private Pay, , Abigal Andrews

Charge Rate: Hourly: \$ 18.00

Pay Rate: Hourly: \$ 9.00

Lock Rates:

Back Finish

# Assign Caregiver to Unassigned Visit

To assign a caregiver, double click into the unassigned visit. To assign either:

- Select the caregiver you would like to assign

**OR**

- Click Find Available

If an on-going order was created without an assigned caregiver, be sure to open the order on the Client tab to assign the caregiver to the entire order, rather than the individual visit from the scheduler.

**Edit Visit for [Newcomer, Lester] start on [Sat 10/10/2020 2:30 PM] code [35010]**

Visit Details | Visit History | Client Orders | Captured Documents

Client: Newcomer, Lester Subscriber: MDC/MDC

Visit Start: 10/10/2020 Duration: 05:30 Start Time: 02:30 PM End Time: 08:00 PM

Charge Code: 35010 : CNA Hourly Client Zone: South [Show Codes](#)

Subscriber\*: 2 - Virginia Medicaid, MDC - Medicaid, Lester Newcomer

Assign Caregiver: I will assign later [Find Available](#) **2**

Visit Status: Unassigned

Comment: Type a short comment...

Charge Rate: Hourly: \$ 18.00

Pay Rate: Hourly: \$ 9.00

Lock Rates:

[Save & Close](#) [Cancel](#)

**To change the Charge Code of the visit, click Show Codes and select a new Charge Code. This will change the Caregivers list for the Assign Caregiver drop down.**

**To assign a Caregiver, either select a Caregiver from the drop down menu or click Find Available.**  
**Note: Find Available can only be used for future visits.**

**Unassigned visits show in orange**

**1**

# Find Available Caregivers

Using the Find Available function, you can either directly select an available caregiver or tap the phone icons beside each caregiver you would like to notify about the open visit to take.

In addition to seeing the skill, availability, and zone for the caregiver, you can see:

- Distance – indicates the distance a Caregiver will have to travel (either from their home address or the previous visit).
- Time – indicates when the previous visit ends, if there is another one that day.

To find available Caregiver, first select the criteria to search. You can limit by skill level and zone, and choose to account skills vs. needs, etc.

**Find Availability Criteria**

Caregiver Skill Level: All Applicable Skills

Caregiver Zone(s): South

Special Criteria

Evaluate Skills vs Needs

Include Time and Distance Calculations

Filters:  Familiar Client  Can Drive

**2** Find Cancel

3

**Find Available Caregiver**

Caregiver	Skill	Available	Connect	Zone	In Zone?	Sched	Desired	Rem
<b>3</b> Craig, Butch (727) 686-3425	CNA	Yes	No	North S...	Yes	0	45	45
Elliot, Missy	CNA	Yes	No	South	Yes	0	25	25
Goudy, Trey	CNA	Yes	No	North S...	Yes	0	36	36
Jones, Jenny	CNA	Yes	No	North S...	Yes	0	0	0
Mairn, Meg	CNA	Yes	No	North S...	Yes	0	0	0
McBride, Martina (727) 444-4444	CNA	Yes	No	North S...	Yes	0	36	36

**4** Select & Close Cancel

If there is a Caregiver you find in the search that you want to assign, select the Caregiver and click Select & Close to assign.

To offer the visit to Caregivers via text, click the phone icon beside each. Icons with an orange halo mean they will receive a text. Click the Phone icon in the top left to review and send the text message.

3

**Find Available Caregiver**

Caregiver	Skill	Rem
<b>5</b> Craig, Butch (727) 686-3425	CNA	45
Elliot, Missy	CNA	25
Goudy, Trey	CNA	36
Jones, Jenny	CNA	0
Mairn, Meg	CNA	0
McBride, Martina (727) 444-4444	CNA	36

**4** Send New Visit Message for [Newcomer, Lester]

To: Craig, Butch [CNA], McBride, Martina [CNA]

Message:\* Visit available 10/10/2020 02:30 PM to 10/10/2020 08:00 PM for [Newcomer, Lester]

82 characters of max 159.

\* required

Send Cancel

Select & Close Cancel

# Manage Caregiver Visit Messages

You can manage messages under the Message Alerts tab in Quick Summaries on the Scheduler.

Once you have received a response from a caregiver who would like to take the visit, you can assign directly from the messages.

Quick Summaries

Message Alerts (1)

ID	Visit Date	Start	Stop	Charge Co...	Client	Replies	Caregivers
3752	10/10/2020	02:30 PM	08:00 PM	35010	Newcomer,...	0	

To manage the messages, navigate to the Message Alerts tab under Quick Summaries found near the bottom of the Scheduler tab and double click into the message.

Message #3752 Activity for [Newcomer, Lester], Sat 10/10 02:30 PM - [35010] CNA Hourly

Date/Time	Sent To	Caregiver	Message
10/08/2020 01:10 PM	727686...	Craig, Butch [CNA]	Visit available 10/10/2020 02:30 PM to 10/10/20...

Select the Caregiver and click the person icon. Click Assign and Send to assign the Caregiver to the visit and send a confirmation text. All other messaged Caregivers will get a declined text.

Assign Visit Message for [Craig, Butch [CNA]]

Assigned To: Craig, Butch [CNA]

Message:\* Thank you for accepting [Newcomer, Lester] on Sat 10/10 02:30 PM to 08:00 PM

77 characters of max 159.

Message to declined Caregivers:\* Visit no longer available for [Newcomer, Lester] on Sat 10/10 02:30 PM to 08:00 PM

83 characters of max 159.

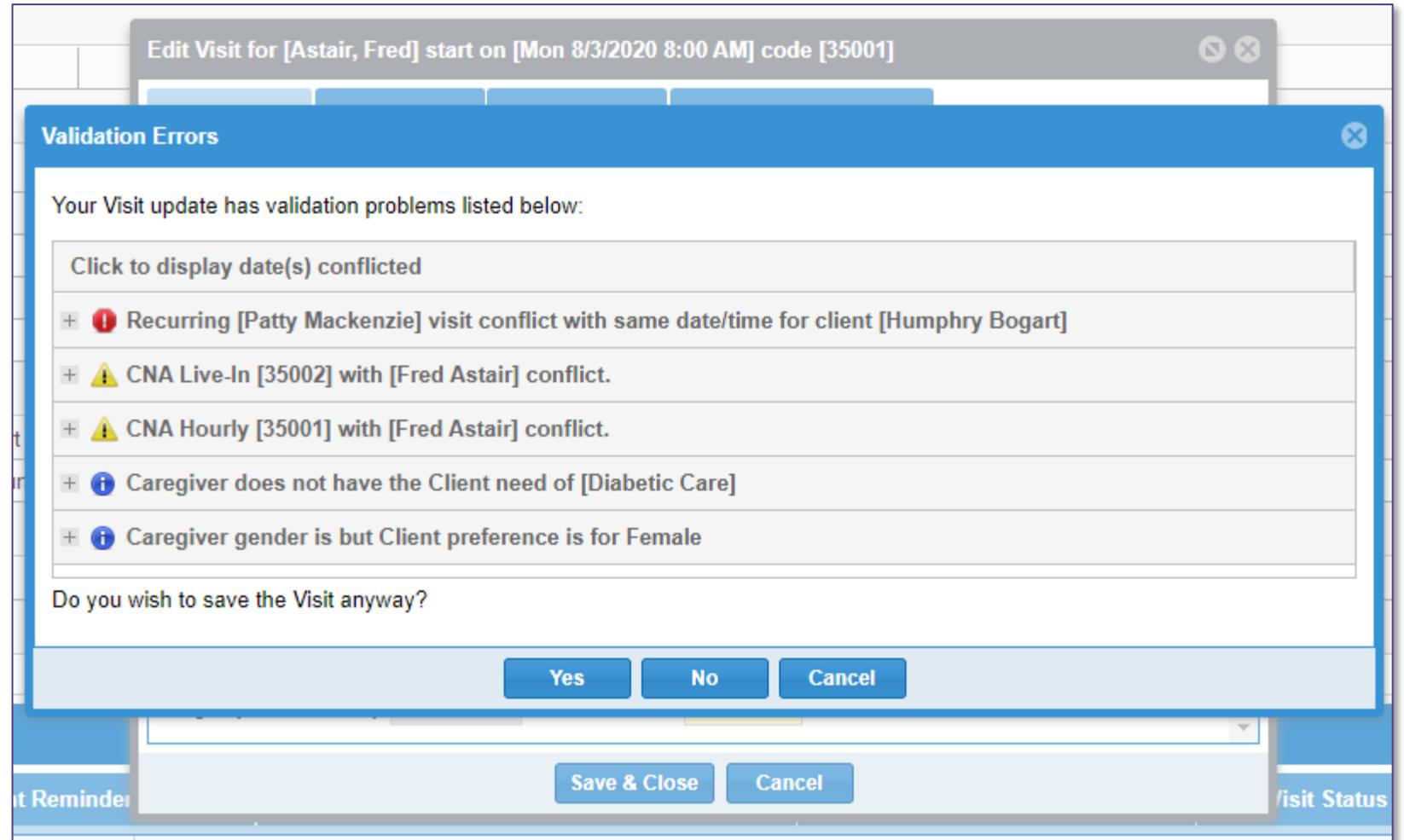
\* required

Assign and Send Cancel

# Visit Validation Errors

Whenever you save a visit, any applicable validation errors will pop up for you to either return and fix or to accept. Some validation errors include:

- Overlapping visits between different caregivers for the same client
- Multiple visits assigned to the same caregiver at that time
- Skills v. Needs mismatches
- Preference mismatches





## Using the Scheduler Tab



# Using the Scheduler Tab

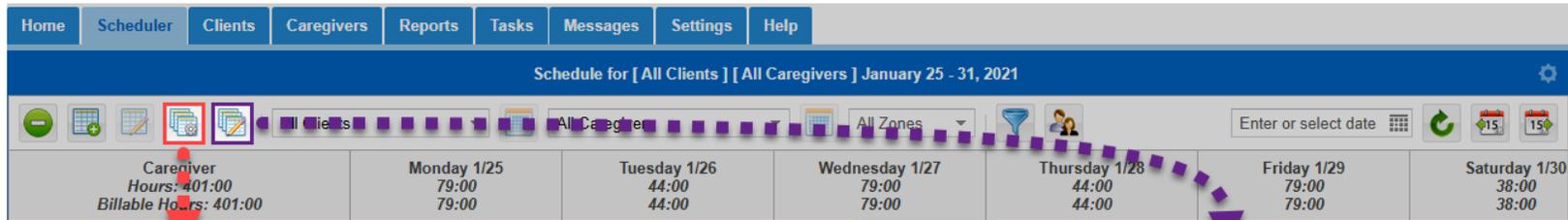
- The Scheduler will show all scheduled visits within a given week. Each visit will show in a different color depending on the visit status.

The screenshot displays the CareWhen Scheduler interface. At the top, there are navigation tabs: Home, Scheduler, Clients, and Caregivers. A red-bordered box highlights the text: "Visits on the Scheduler will show in different colors base on the visit status". Below this, there are filters for "All Clients", "All Caregivers", and "All Zones". The main area is a grid showing a weekly schedule from Monday 8/3 to Friday 8/7. The grid columns represent days and their respective hours. The rows represent caregivers and their scheduled visits. Each visit is color-coded based on its status: "Completed" (light blue), "Started" (orange), "Held" (yellow), "Unassigned" (grey), "Canceled" (pink), and "Ok" (white). Callout boxes with arrows point to these specific visit cells, identifying their status. For example, a visit by Sue Althof on Tuesday is marked "Unassigned", a visit by Nick on Wednesday is marked "Started", a visit by Tracy on Wednesday is marked "Held", a visit by Tracy on Friday is marked "Canceled", and a visit by Craig on Monday is marked "Completed".

Caregiver Hours: 184:00 Billable Hours: 184:00	Monday 8/3 42:00 42:00	Tuesday 8/4 22:00 22:00	Wednesday 8/5 36:00 36:00	Thursday 8/6 36:00	Friday 8/7 26:00 26:00
05:00 AM (5)					
Althof, Sue [CNA]	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James	5:00a-9:00a Dean, James
06:00 AM (11)					
			CNA 6:00a-10:00a Nick,...		
Craig, Meg [CNA]	6:00a-10:00a Tracy, Sp...		* 6:00a-10:00a Tracy, Sp...		* 6:00a-10:00a Tracy, S...
MacEachern, Aileene [C...]	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg	6:00a-10:00a Craig, Meg
Penn, Sean [CNA]		6:00a-10:00a Kennedy, John			

# Using the Scheduler Tab

- Use the Edit Visits and Complete Visits functions to alter or complete multiple visits at a time.



**Edit Visit(s)**

1 Filters: Andrews, Abigail | No Caregiver selec | All Statuses | Start Date: 01/25/2021 | View Mode: Weekly

3 Edits: Select Caregiver to assign | Status: No change | Comment: Type a short comn | **Apply Edits** 4

Caregiver	Cha...	Date	Start	Stop	Duration	Reduc...	Status	Client	
<input checked="" type="checkbox"/>	Yadger, Hamid [CNA]	35002	Mon 01/25	08:00 AM	12:00 PM	04:00	0	Ok	Andrews, Abigail
<input checked="" type="checkbox"/>	Yadger, Hamid [CNA]	35010	Mon 01/25	12:00 PM	04:00 PM	04:00	0	Ok	Andrews, Abigail
<input checked="" type="checkbox"/>	Fowler, John [CNA]	35010	Mon 01/25	03:00 PM	07:00 PM	04:00	0	Ok	Andrews, Abigail
<input type="checkbox"/>	Yadger, Hamid [CNA]	35010	Mon 01/25	06:00 PM	08:00 PM	02:00	0	Ok	Andrews, Abigail
<input type="checkbox"/>	Yadger, Hamid [CNA]	35002	Tue 01/26	08:00 AM	12:00 PM	04:00	0	Ok	Andrews, Abigail

5 **Save** Cancel

**Complete Visit(s)**

1 Andrews, Abigail | No Caregiver selected | Start Date: 01/25/2021 | View Mode: Weekly

Caregiver	Cha...	Date	Start	Stop	Duration	Reduc...	Status	Client	
<input checked="" type="checkbox"/>	Yadger, Hamid [C...	35002	Mon 01/25	08:00 AM	12:00 PM	04:00	0	Ok	Andrews, Abigail
<input checked="" type="checkbox"/>	Yadger, Hamid [C...	35010	Mon 01/25	12:00 PM	04:00 PM	04:00	0	Ok	Andrews, Abigail
<input checked="" type="checkbox"/>	Fowler, John [CNA]	35010	Mon 01/25	03:00 PM	07:00 PM	04:00	0	Ok	Andrews, Abigail
<input checked="" type="checkbox"/>	Yadger, Hamid [C...	35010	Mon 01/25	06:00 PM	08:00 PM	02:00	0	Ok	Andrews, Abigail
<input type="checkbox"/>	Yadger, Hamid [C...	35002	Tue 01/26	08:00 AM	12:00 PM	04:00	0	Ok	Andrews, Abigail
<input type="checkbox"/>	Yadger, Hamid [C...	35010	Tue 01/26	12:00 PM	04:00 PM	04:00	0	Ok	Andrews, Abigail

3 **Complete** Cancel

Edit a group of visits at once by filtering via Caregiver or Client, as well as Status and Start Date.

Check the visits you wish to edit. Select the desired mass edit, such as assigning a Caregiver to every selected visit, changing the status, or leaving a comment on each visit.

Click Apply Edits and Save.

Complete multiple visits at a time by filtering via Client, Caregiver, or Start Date.

Check the visits you wish to complete, and click Complete.

# Using the Scheduler Tab

- Use the Filter function to narrow the visits displayed in the Scheduler view
- Use the Caregiver Selector to drag and drop Caregivers onto visits
- Use the Scheduler Settings to change the display of the Scheduler tab

The screenshot shows the AssuriCare Scheduler interface. At the top, there are navigation tabs: Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings, and Help. The main area displays a grid of visits for Monday 1/25, Wednesday 1/27, and Thursday 1/28. A filter dropdown menu is open, showing options for All Visit Statuses, Ok, Unassigned, Cancelled by Scheduler, Cancelled by Client, Cancelled by Caregiver, Cancelled by Other, Held, Started, Completed, Conflict, Caregiver Not Available, and Unavailable Override. A blue callout box points to the filter dropdown with the text: "Use the Filter button to sort the Scheduler tab via Skill Levels, Client Types, or Visit Status." A green callout box points to the Settings icon in the top right with the text: "View the Schedule Settings to change display options on the Scheduler." A red callout box points to the Caregiver Selector tool with the text: "Quickly assign Caregivers to visits by using the Caregiver Selector tool. Locate the desired Caregiver from the list, then drag and drop them to the visit you wish to assign them to." The Caregiver Selector tool is a window with a search bar and a list of caregivers with columns for Name, City, State, and Phone. The Scheduler Settings window is also visible, showing options for Status Float, Display Mode, and Group By.

AssuriCare

vanM@ AssuriCare! January 29, 2021, 11:32:27 AM

Home Scheduler Clients Caregivers Reports Tasks Messages Settings Help

Schedule for [ All Clients ] [ All Caregivers ] January 25 - 31, 2021

Filters: All Skill Levels All Client Types All Visit Statuses

Use the Filter button to sort the Scheduler tab via Skill Levels, Client Types, or Visit Status.

View the Schedule Settings to change display options on the Scheduler.

Use the Caregiver Selector to drag and drop Caregivers onto visits

Quickly assign Caregivers to visits by using the Caregiver Selector tool. Locate the desired Caregiver from the list, then drag and drop them to the visit you wish to assign them to.

Caregiver Selector - Drag & Drop to Schedule

Name[Skill] ↑	City	St...	Phone
Apple, Annie [CNA]	St Petersburg	FL	(727) 999-8888
Billings, Brenda [CNA]	St Petersburg	FL	
Cheerie, Cheryl C [CNA]	Spokane Vly	WA	(208) 661-0836
CK, Louis [CNA]	St Petersburg	FL	(208) 661-0836
Craig, Bo [CNA]	St Petersburg	FL	
Crain, Butch [CNA]	St Petersburg	FL	(727) 686-3425

Page 1 of 2 Page Size: 25 Displaying 1 - 25 of 27

Quick Summaries

# Using the Scheduler Tab

- Make use of the Client Monthly View to see a Client's scheduled visits on a monthly-basis
- Use this view to quickly identify whether or not a Client is within, or has exceeded, their Insurance Preauth amount

Use the Client Monthly View to display a day-by-day breakdown of all visits associated with that client, as well as their Insurance Preauth status, if applicable.

Use the Weekly View button to return to the standard Scheduler view.

# Scheduler Tab Quick Summaries

The bottom of the scheduler tab houses the Quick Summaries area. This area is made up of tabs containing useful information such as a Daily Summary, Messages and Alerts, Visit Status, and EVV Exceptions (EVV visits containing an issue such as a mismatched phone number).

Cheerie, Cheryl [CNA]	9:00a-10:00a Carr, Cha...		9:00a-10:00a Carr, Cha...		9:00a-10:00a Carr, Cha...	
= 10:00 AM (6)						
Cheerie, Cheryl [CNA]	10:00a-11:30a Carr, Ch...		10:00a-11:30a Carr, Ch...		10:00a-11:30a Carr, Ch...	
CK, Louis [CNA]	10:00a-4:00p Bunny, B...		10:00a-4:00p Bunny, B...		10:00a-4:00p Bunny, B...	
= 11:00 AM						

Quick Summaries							
Daily Summary	Message Alerts (0)	Caregiver Reminder Alerts (0)	Client Reminder Alerts (0)	Unassigned & Caregiver Not Available Visits (3)	Clients with Overlapping Visits (12)	EVV Visit Status	EVV Exceptions (0)
Day	Date	Visits	Unassigned	Completed	Hours		
Monday	10/19/2020	14	0	0	79.00		
Tuesday	10/20/2020	8	0	0	44.00		
Wednesday	10/21/2020	14	0	0	79.00		
Thursday	10/22/2020	8	0	0	44.00		
Friday	10/23/2020	14	0	0	79.00		
Saturday	10/24/2020	6	1	0	38.00		
Sunday	10/25/2020	6	1	0	38.00		
	Totals :	70	2	0	401.00		



# Appendix

# A Note about “Skills”

Agencies also have the option to use *Skills*, which are set up within the Agency Tables. These *Skills* are used to list specific abilities that caregivers may have. These skills will also show up on client records as *Needs*. Agencies can use this information to further aid in ensuring that properly skilled caregivers are scheduled.

1 Settings

2 Agency Tables

3 Skills

4 Add

5 Skills

Tip: Drag & Drop to reorder.

Description	Active
Dementia Care	<input checked="" type="checkbox"/>
Diabetic Care	<input checked="" type="checkbox"/>
Hoyer Lift	<input checked="" type="checkbox"/>
Lifting	<input checked="" type="checkbox"/>
Cats	<input checked="" type="checkbox"/>
Dogs	<input checked="" type="checkbox"/>
Live-In	<input checked="" type="checkbox"/>
Smokes Inside	<input checked="" type="checkbox"/>
<input type="text"/>	<input checked="" type="checkbox"/>

Add skills by clicking the Add button and typing the skill name in the new line. Click the Check Mark to save the Skill when complete.

Edit Caregiver Record : Apple, Annie [COM]

Personal Private Scheduling Agency Time Sheets Reimbursement Unavailable Ph

Zone:\*  North  South  West

Desired Hours Per Week: 30

Skills:  Check All  Cats  Dementia Care  
 Diabetic Care  Dogs  Hoyer Lift  
 Lifting  Live-In  Smokes Inside

Edit Client Record [Abigail Andrews]

Personal Private Scheduling Agency Billing Contacts Location Notes Financial

Zone:\* North

Primary Caregiver: Glynn, Derek

Needs:  Check All  Cats  Dementia Care  
 Diabetic Care  Dogs  Hoyer Lift  
 Lifting  Live-In  Smokes Inside

“Skills” and “Needs” as shown on the Scheduling tabs of the Caregiver and Client records

# Enable Skills vs. Needs Conflicts

You can enable warnings for when there is a mismatch between the caregiver's skills and the client's needs.

The screenshot shows the AssuriCare configuration interface. The top navigation bar includes 'Home', 'Scheduler', 'Clients', 'Caregivers', 'Reports', 'Tasks', 'Messages', 'Settings', and 'Help'. The 'Settings' menu is highlighted with a red circle and the number '1'. The left sidebar shows a tree view with 'Agency Settings' expanded, containing 'Agency Info', 'Configuration', 'Zones', 'Client Types', 'Field Setup', 'Skill Levels', 'Skill Type', 'Text Messaging', and 'Agency Logo'. 'Configuration' is highlighted with a red circle and the number '2'. The 'Agency Configuration' sub-menu is highlighted with a red circle and the number '3'. The 'Disable Needs vs Skills' checkbox is highlighted with a red circle and the number '4'. A purple callout box points to the checkbox with the text: 'If unchecked, this will ensure warnings are generated if a Caregiver does not have a skill that a client needs'. The checkbox is currently unchecked.

If enabled, a warning displays if a visit is scheduled with a Caregiver that does not have the skill that the client needs.

**Note:** This will not prevent scheduling the visit

The screenshot shows the 'Validation Errors' dialog box. The title bar reads 'Validation Errors'. The main content area contains the text: 'Your new Order has validation problems listed below:'. Below this is a list of errors. The first error is 'Click to display date(s) conflicted'. The second error is 'Caregiver does not have the Client need of [Diabetic Care]'. At the bottom of the dialog box are three buttons: 'Yes', 'No', and 'Cancel'.