



CareWhen Enhancements

Release Notes: May 12, 2021



Update Charge Codes on Completed Visits

HOW TO USE:

1. Charge codes can now be updated using the 'Show Codes' button on completed/unapproved visit without needing to set the status to 'OK'
2. The codes selected must be in the appropriate hierarchy for the assigned caregiver

Edit Visit for [Aaker, Ruth "Marie"] start on [Tue 5/4/2021 7:00 AM] code [35011]

Visit Details | Visit History | Client Orders | Tasks | Captured Documents | Alt EVV

Client: **Aaker, Ruth "Marie"** Subscriber: **PVT/None** Contiguous Visit (first) 

Visit Start: 05/04/2021 Duration: 00:30 Start Time: 07:00 AM End Time: 07:30 AM

Charge Code: **35011 : CNA Hourly** Client Zone: **Spokane** **Show Codes**

Search:  

Charge Code	Description	Effective Date
35010	CNA Hourly	
35011	CNA Hourly	
35012	CNA Hourly Evening adding more to the de	
35014	CNA Test not holiday eligible	
35015	CNA test no associated G/L code	

Subscriber:* 1 - Private Pay, , Ruth Aaker

Save & Close Cancel

Limited AIM Message Thread

HOW TO USE:

1. The message thread seen on the mobile app or caregiver portal is limited to the originator and logged in recipient
2. Originator of the message will still see the entire message thread

The screenshot displays the 'Agency Internal Messages' interface. At the top, there are navigation tabs: Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, Settings, and Help. The 'Messages' tab is active, showing a list of internal messages. The table below contains the following data:

ID	Message Date	Sent By	Viewed By	Subject	Last Update
9450	05/04/2021 11:48 AM	G, Patty	2 of 3	Meeting May 15	05/04/2021 11:51 AM
9421	04/29/2021 07:07 AM	G, Patty	2 of 3	Still testing AIM messaging	04/29/2021 11:35 AM
9417	04/28/2021 07:23 AM	G, Patty	1 of 3	Aim message testing	04/28/2021 07:23 AM

Below the table, there are navigation controls: Page 1 of 1, Page Size: 25, and Displaying 1 - 3 of 3. A 'Message Threads (3)' section is visible, showing a detailed view of the message with ID 9450. The subject is 'Meeting May 15'. The message content is as follows:

A, Marissa on 05/04/2021 11:50 AM sent:
please let me know what time.

B, Brandon on 05/04/2021 11:49 AM sent:
Yes I am available but it would be helpful to know what time.

G, Patty on 05/04/2021 11:48 AM sent:
Please let me know if you are available for this meeting.

The detailed view also includes a 'Back' button, a 'Delete' button, and a 'Reply to' button. The bottom of the screen shows the 'AssuriCare' logo and the 'CareWhen?' logo.

Update to Completed Visit by Client Report

HOW TO USE:

1. The 'Completed Visit by Client' report can now be run as a summary by checking the 'Summary Only' checkbox
2. The report is condensed to a single line which may be easier to compare against billing reports

The screenshot shows the 'Create Reports' interface. On the left is a tree view of report categories: Billing Reports, Caregiver Reports, Client Reports, ClockWork Reports, Illinois DOA, and Management Reports. On the right is the 'Report Selections: Completed Visits by Client' panel. It includes fields for 'From Date:' (04/15/2021) and 'To Date:' (05/05/2021). Below these are radio buttons for 'Clients:' (All selected, Selection unselected). At the bottom, the 'Summary Only:' checkbox is checked and highlighted with a red border.

05/10/21 06:48 AM ASI - Patty Page 1

Completed Visits by Client Summary from 04/15/2021 to 05/09/2021

Criteria: for all Clients, Zones = All, Client Type = All

Client Name	Revenue	Visits	Hours		
Aaker, Calvin [1106.A]	\$190.50	4	12.25		
Aaker, Ruth Marie [1083.A]	\$462.00	23	13.25		
Address, Valerie [1115.E]	\$74.00	3	2.25		
Anthony, Abigal Brie [1018.A]	\$63.00	2	1.50		
Bartel, Amelia Jane [1027.E]	\$31.50	1	0.75		
Bowers, William [1011.A]	\$42.00	1	1.00		
Brown, Mandy [1030.A]	\$73.50	1	1.75		
Cula, Calvin [1101.A]	\$70.50	2	4.25		
Flores, April [1029.A]	\$10.50	1	0.25		
White, Betty A [25.E]	\$45.00	1	0.25		
Totals:		10	\$1,062.50	39	37.50

Update to Caregiver Time Sheet Report

HOW TO USE:

1. The following selection criteria has been added to the 'Caregiver Time Sheets' report: 'Exclude Incomplete Visits', 'Include Care Plan Task Comments' and 'Include Visit Code'
2. When selected, the desired information will be included on the report output

Create Reports

Report Selections: Caregiver Time Sheets

Period: Weekly

From Date: 04/01/2021

To Date: 05/15/2021

Caregivers: All Selection

Caregiver Status: Active

Name Format: [Dropdown]

Zone: Check All Coeur d'Alene Mead Post Falls Spokane

Exclude Incomplete Visits:

Include Care Plan Task Comments:

Include Visit Code:

CHS Test Services
33 Mulberry Grn, Spring City, PA 19475 Phone: (509) 555-1212 Fax:

Time Sheet

Client Name: Andrews, Abigail [S.K]
1334 S Nugget Dr. Coeur D Alene ID,
83814-8547
(509) 555-1212

Employee Name: Doe, Jane LPN [3.C.S.H.K]
Plan Created by Nelson, Alan on 03/22/2021

I certify that this is a true and accurate record of dates, times, and services provided.

Client Signature: _____ **Date:** _____

I certify that the hours indicated have been worked for and approved by the client. I further certify that no accident or injury was sustained by me while working on this assignment, unless an incident report has been previously filed during this pay period.

Employee Signature: _____ **Date:** _____

Client Name: Andrews, Abigail [S.K] **Employee Name:** Doe, Jane LPN [3.C.S.H.K]

Monday Actual: 05/10/2021 12:45 PM - 01:00 PM Scheduled: 05/10/2021 11:00 AM - 01:00 PM

36010 Homemaker Hourly

Task	Required	Status	Frequency	Task	Required	Status	Frequency	Task	Required	Status	Frequency
Homemaker Services: CP Task: Community Outing Comment: Went to church	No	C	PRN	Homemaker Services: CP Task: Cooking Comment: Spaghetti and meatballs	Yes	C	Every Visit	Homemaker Services: CP Task: Grocery Shopping Comment: Default comment from the Grocery Shopping task in the Tasks table	No	R	PRN
Personal Care: CP Task: Bathing Comment:	No		PRN	Personal Care: CP Task: Dressing Comment:	No		PRN				

Note: Ended visit early due to family member arriving

Client Signature: *A Andrea* **Employee Signature:** *J Doe*

R = Refused, C = Completed, * = Task not on Care Plan

Update to Insurance Batch Print Out

HOW TO USE:

1. You can now print insurance claim reports by 'Units'
2. When you click on the printer icon, you now have the option to select 'Units'

The screenshot shows the 'Rebill Claims' interface. At the top, there are navigation tabs: Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, Settings, Help. Below these are functional tabs: Send Reminders, Exports, Approval, Misc Transactions, Pay/Adjust, Invoicing, Insurance Billing, Time Sheets. The main section has sub-tabs: Insurance Prep, Insurance Claims, Rebill Prep, Rebill Claims. A dropdown menu shows 'EMC'. There are icons for 'Create File', a printer, and a delete icon. A table lists claims:

Created On ↓	Rebill Date	Payor Name	Claim Type	
<input type="checkbox"/>	04/22/2021	04/22/2021	BX - Blue Cross	Institutional
<input checked="" type="checkbox"/>	11/19/2020	11/19/2020	MOL - Molina Idaho Medicaid	Institutional
<input type="checkbox"/>	11/02/2020	11/02/2020	MOL - Molina Idaho Medicaid	Institutional
<input type="checkbox"/>	08/04/2020	08/04/2020	MOL - Molina Idaho Medicaid	Institutional

A 'Print Claim' dialog box is open with the following options:

Type: Detail Summary Units

Buttons: Go, Cancel

ASI - Patty
 Clients with Insurance Claims for MOL,
 Charges from 10/12/2020 to 10/16/2020
 Created 05/10/21 12:49 PM

Client Name	Dates of Service	Units	Amount
Deaton, Daryl [1082.A]	10/12/2020 - 10/16/2020	6.75	\$202.25
Aaker, Ruth [1083.A]	12/03/2019 - 12/05/2019	11.00	\$42.35
Deaton, Daryl [1082.A]	12/02/2019 - 12/06/2019	6.00	\$162.00
Knowles, Kendall [1095.A]	12/02/2019 - 12/08/2019	24.00	\$724.50
Knowles, Kyle [1096.A]	12/02/2019 - 12/06/2019	3.00	\$81.00
Total:		6.75	\$202.25

Added Caregiver Overtime Report

HOW TO USE:

1. A new 'Caregiver Overtime' report has been added to the 'Caregiver Reports' tree based on user role settings
2. Overtime is based on the agency reimbursement configuration settings

Configuration

Agency Configuration | Schedule Configuration | Order Configuration | Reimbursement Settings

Week Start Day: Sunday

Holidays:

Holiday Name	Date ↑	Starts	Ends	
New Year's Day	Wed 01/01/2020	12:00 AM	11:59 PM	✗
Labor Day	Mon 09/07/2020	12:00 AM	11:59 PM	✗
Test Holiday	Mon 10/05/2020	12:00 AM	11:59 PM	✗
Columbus Day	Mon 10/12/2020	12:00 AM	11:59 PM	✗
Christmas Day	Fri 12/25/2020	12:00 AM	11:59 PM	✗
MLK	Mon 01/18/2021	12:00 AM	11:59 PM	✗

Bill Holiday at 1.5x of regular charge:

Overtime Threshold/Day: 7

Overtime Threshold/Week: 40

Overtime Type: Traditional

Default Visit Start Time: 8:00 AM

Sch. Display Start Time: 7:00 AM

May 2021

Today

Create Reports

- Billing Reports
- Caregiver Reports
 - Caregiver Census by Date Range
 - Caregiver Census Detail
 - Caregiver Education
 - Caregiver Notes
 - Caregiver Overtime**
 - Caregiver Reliability
 - Caregiver Reminders
 - Caregiver Time Sheets
 - Caregiver Weekly Task Sheets
 - Caregivers by Birthday
 - Caregivers Hired or Terminated

ABC Test Agency

Clinician Overtime from 03/28/2021 to 05/08/2021

Created 05/10/21 01:08 PM

Criteria: for selected Clinicians, Zones = All, Skill Levels = All

Clinician Name	From Date	To Date	Hours	Client	Client Hours
Brown, Mark 1017.ML					
	3/28/2021	4/3/2021	40.50	Martin, Rose [2627.ML]	9.25
				Murray, Carole [2638.ML]	31.25
	4/25/2021	5/1/2021	42.75	Martin, Rose [2627.ML]	9.00
				Murray, Carole [2638.ML]	33.75
	5/2/2021	5/8/2021	40.25	Martin, Rose [2627.ML]	10.00
				Murray, Carole [2638.ML]	30.25
Totals			123.50	123.50	
Report Totals			123.50		

Added Projected Revenue Report

HOW TO USE:

1. A new 'Projected Revenue' report has been added to the 'Management Reports' based on user role settings
2. This report can be used to calculate future revenue based on existing scheduled visits

The screenshot shows the 'Create Reports' interface. On the left, a tree view lists various report categories, with 'Management Reports' expanded and 'Projected Revenue' highlighted with a red box. On the right, the 'Report Selections: Projected Revenue' panel is visible, containing fields for 'From Date', 'To Date', 'Zone', 'Type', 'Group By', 'Output File Type', and 'Save Selections As'. The 'Zone' section includes checkboxes for various locations like Bonners Ferry, Hayden, Medical Lake, Sandpoint, and Spokane Valley. The 'Type' section includes checkboxes for service types like Check All, Medicaid Waiver, Orthopedic, and Veterans Administration. The 'Group By' section has radio buttons for 'Zone' and 'Client Type'. The 'Output File Type' is set to 'PDF'.

ASI - Patty					
Projected Revenue from 04/04/2021 to 04/10/2021					
Created 05/10/21 01:23 PM					
Criteria: Zones = All, Client Type = All					
	Visits	Code	Description	Total Hours	Total Revenue
Skilled					
	1	30001	RN Admit Visit	1.00	\$75.00
	5	30002	RN Routine Visit	2.50	\$250.00
	18	33010	LPN Visit	20.50	\$810.00
	16	33011	LPN Hourly	16.00	\$480.00
Sub Total	40			40.00	\$1,615.00
Total	40			40.00	\$1,615.00
Personal Care					
	144	35011	CNA Hourly	225.00	\$9,450.00
	13	35012	CNA Hourly Evening	104.50	\$3,135.00
	10	35020	CNA hourly another code	40.00	\$1,240.00
	21	35021	CNA hourly test	57.50	\$1,610.00
	5	35030	CNA Hourly	5.00	\$125.00
Sub Total	193			432.00	\$15,560.00
Total	193			432.00	\$15,560.00
Homemaking					
	14	36010	HHA Hourly	32.75	\$818.75
Sub Total	14			32.75	\$818.75
Total	14			32.75	\$818.75
Companion Care					
	13	37012	HMK Hourly	55.00	\$1,375.00
Sub Total	13			55.00	\$1,375.00
Total	13			55.00	\$1,375.00
Grand Total	260			559.75	\$19,368.75

Update to Auto Generate Travel/Miles

HOW TO USE:

1. Additional configuration settings have been added when auto generate mileage and travel time is enabled on the settings > ClockWork/EVV options tab
2. When the 'Exclude First Visit of the Day' box is checked, mileage and travel time will not be generated on the caregiver's first visit of the day
3. When the 'Exclude Adjacent Visits' box is checked, mileage and travel time is not generated on adjacent visits

Note: This setting may be used if doing facilities visits

4. When you set a value in the text box next to 'Exclude Visits Over XX hours/minutes,' mileage will not be generated based on that value

Example: Hour/minutes value entered is 2.5, mileage will not generate on visits that the start time of the next visit is 2.5 hours or greater than the end time of the previous visit

The screenshot shows the 'Options' tab in the ClockWork/EVW settings. The 'Use Travel Mileage (TM):*' dropdown is set to 'Auto Generate Travel Mileage' and the 'Use Travel Time (TT):*' dropdown is set to 'Auto Generate Travel Time'. These two dropdowns are highlighted with a red box.

The screenshot shows the 'Options' tab in the ClockWork/EVW settings. Under the 'Scheduling:' section, the 'Exclude First Visit of the Day:' checkbox is checked and highlighted with a red box. The 'Exclude Visits over XX hours/minutes:' text box contains the value '2.5' and is also highlighted with a red box.

CareWhen is Certified as Alternate EVV Vendor in Idaho

UPDATE:

1. CareWhen is now authorized to interface with the Idaho Sandata aggregator system

