



CareWhen Enhancements

Release Notes: Version 3.4.0 August 25, 2021



General Performance Enhancements

- We have enhanced the applications performance in the following areas
 - Invoicing
 - Visit Approval
 - Login

Set the schedule as your home page

HOW TO USE:

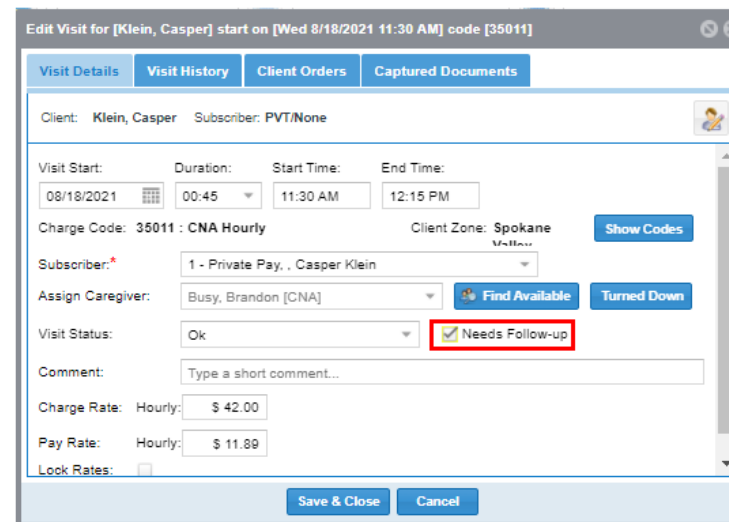
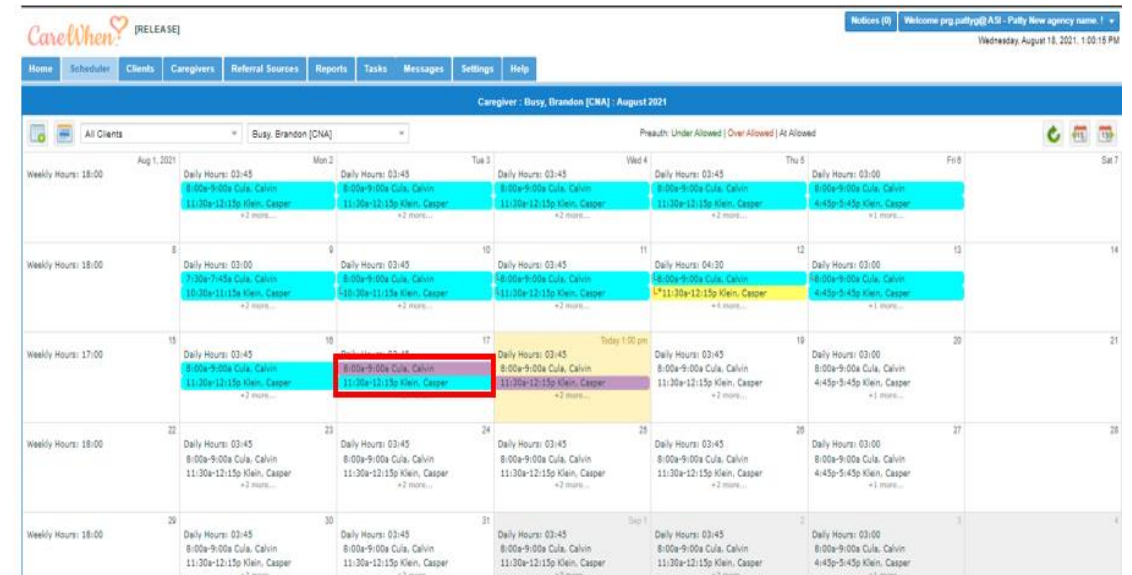
1. Users can now set the Scheduler tab as their Default Home page, which allows the user to go directly to the scheduler tab upon login.
2. This is done from the Schedule display Gear icon, marking the Make Scheduler tab my Home page.
3. The change will be retained upon logout and remain until settings are reset.

The screenshot displays the AssuriCare Scheduler interface. At the top, there are logos for CareWhen [INTEGRATION] and AssuriCare. A navigation bar includes tabs for Home, Scheduler, Clients, Employees, Referral Sources, Reports, Tasks, Messages, Settings, and Help. The main content area shows a schedule grid for 'All Clients' and 'All Employees' for the week of July 5-11, 2021. A 'Schedule Settings' dialog box is open on the right, with the 'Make Scheduler tab my Home Page' option checked. The dialog also shows settings for Status Float (None), Display Mode (Employee), and Group By (Hourly). A red box highlights the gear icon in the top right corner of the scheduler interface, which is used to access these settings.

Easily identify visits needing follow-up on the monthly view

HOW TO USE:

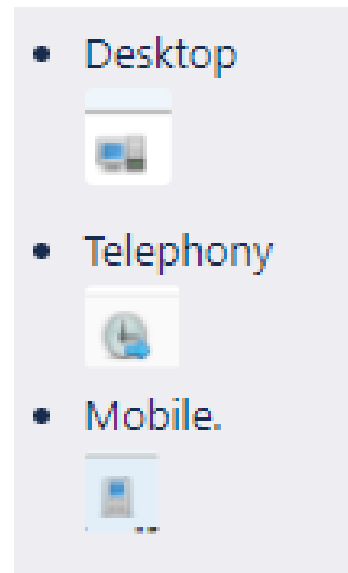
1. Visits marked as needing follow-up on the visit editor are now identified on the monthly schedule view as well as the weekly view.
2. The visits are identified by the lilac color background.



Easily identify the source(s) of the shift on the approval grid

HOW TO USE:

1. The source icon has been added to the approval grid start and stop times.
2. This indicates how the visit was started and completed.

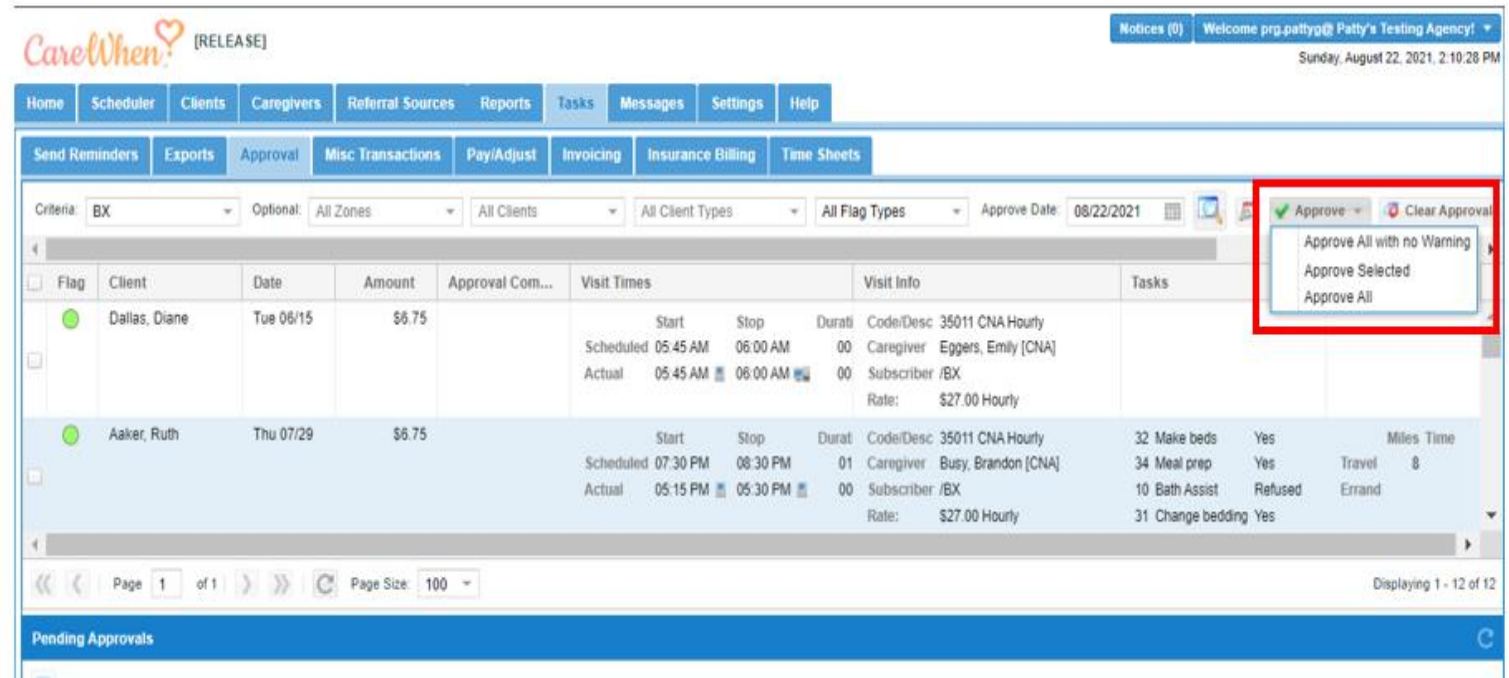


Smith, Jane	Mon 06/07	\$143.36	Start	Stop	Durati	Code/Desc	37005 CFC+Cooes	Miles	Time
			Scheduled 08:00 AM	12:15 PM	04	Clinician	Hani, Tami (HCA)	Travel	15
			Actual 08:15 AM	2:15 PM	04	Subscriber /PO		Errand	
						Rate:	\$35.84 Hourly		
Taylor, Tracy	Mon 06/07	\$161.28	Start	Stop	Durati	Code/Desc	37005 CFC+Cooes		
			Scheduled 08:15 AM	2:45 PM	04	Clinician	Andrew, Antker (HCA)		
			Actual 08:30 AM	1:00 PM	04	Subscriber /PO			
						Rate:	\$35.84 Hourly		
						Comment	unable to clock out per app isn't letting HCA		
Larson, Lisa	Mon 06/07	\$53.76	Start	Stop	Durati	Code/Desc	37010 TRCA (T1005)	43 Universal Precautions	Yes
			Scheduled 08:30 AM	10:00 AM	01	Clinician	Morris, Mary (HCA)		
			Actual 08:30 AM	10:00 AM	01	Subscriber /PO			
						Rate:	\$35.84 Hourly		

Approve visits faster

HOW TO USE:

1. On the Approval tab you now have updated Approve options.
2. "Approve All with no Warnings" will approve all items with the green status flag on all pages, not just the currently displayed one.
3. "Approve Selected" will approve only the selected items.
4. "Approve All" will approve all items regardless of the Status flag on all pages, not just the currently displayed one.



The screenshot displays the CareWhen? [RELEASE] web application interface. The top navigation bar includes links for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, Settings, and Help. The main content area is titled "Approval" and features a table of pending approvals. The table columns include Flag, Client, Date, Amount, Approval Com..., Visit Times, Visit Info, and Tasks. Two rows are visible, each with a green status flag. A dropdown menu is open, showing three options: "Approve All with no Warning", "Approve Selected", and "Approve All". The interface also includes a search bar, a page size selector, and a "Pending Approvals" section at the bottom.

Flag	Client	Date	Amount	Approval Com...	Visit Times	Visit Info	Tasks
Green	Dallas, Diane	Tue 06/15	\$6.75		Scheduled 05:45 AM - 06:00 AM Actual 05:45 AM - 06:00 AM	Code/Desc: 35011 CNA Hourly Caregiver: Eggers, Emily [CNA] Subscriber: /BX Rate: \$27.00 Hourly	
Green	Aaker, Ruth	Thu 07/29	\$6.75		Scheduled 07:30 PM - 08:30 PM Actual 05:15 PM - 05:30 PM	Code/Desc: 35011 CNA Hourly Caregiver: Busy, Brandon [CNA] Subscriber: /BX Rate: \$27.00 Hourly	32 Make beds Yes 34 Meal prep Yes 10 Bath Assist Refused 31 Change bedding Yes

Include shifts from previous period on the Reimbursement Report

HOW TO USE:

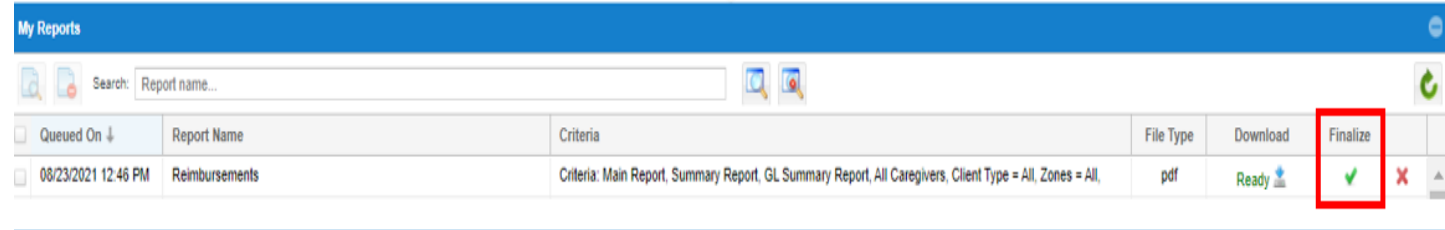
1. The option to "Include Non-Exported Items only" has been added to the Reimbursement Report selection criteria.
2. The option can be selected to pick up Approved items in prior periods not yet exported. This may be a result of late time sheet entries.

The screenshot displays the 'CareWhen [RELEASE]' web application interface. At the top, there is a navigation menu with options: Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, Settings, and Help. Below this is a 'Create Reports' section with a sidebar on the left listing various report categories: Billing Reports, Caregiver Reports, Client Reports, ClockWork Reports, Management Reports, Reimbursement Reports, Reimbursements (highlighted), and Scheduling Reports. The main content area is titled 'Report Selections: Reimbursements' and contains several form fields and checkboxes. The 'Include Non-Exported Items Only' checkbox is highlighted with a red box. Other visible options include 'Pay Date', 'Reimbursement Period', 'From Date', 'To Date', 'Report Type' (Main, Summary), 'Caregivers' (All, Selection), 'Type' (Check All, Medicaid Waiver, Orthopedic, Veterans Administrat, None, Medical, Private Duty), 'Zone' (Check All, Coeur d'Alene, Mead, Post Falls, Spokane, Bonners Ferry, Hayden, Medical Lake, Spokane Valley), 'Separate page for each Caregiver', 'Include G.I. Report' (checked), 'Output File Type' (PDF), and 'Save Selections As'.

Finalize Reimbursement Reports

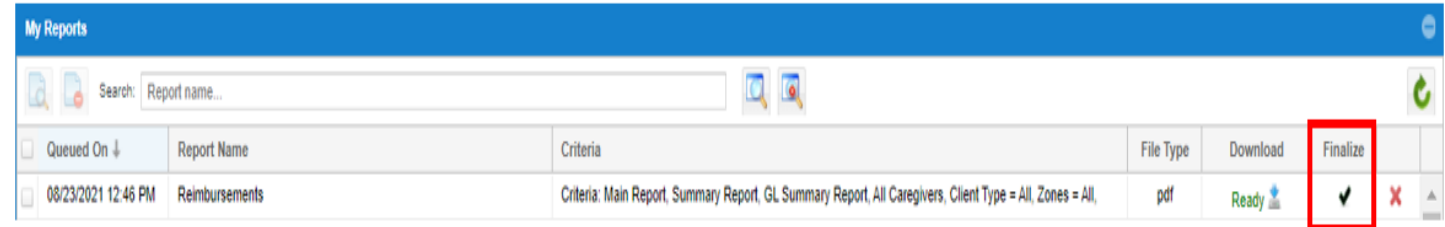
HOW TO USE:

1. A new "Finalize" column has been added to the report queue.
2. Running the "Reimbursements" report populates the "Finalize" column with a green checkmark.
3. Selecting the green checkmark finalizes the export and changes color to black.
4. **Finalized** items will be sent to 3rd party payroll systems and will be excluded from future exports.



The screenshot shows the 'My Reports' interface with a search bar and a table of reports. The table has columns for 'Queued On', 'Report Name', 'Criteria', 'File Type', 'Download', and 'Finalize'. A report named 'Reimbursements' is shown with a 'Ready' status and a green checkmark in the 'Finalize' column, which is highlighted with a red box.

Queued On ↓	Report Name	Criteria	File Type	Download	Finalize
08/23/2021 12:46 PM	Reimbursements	Criteria: Main Report, Summary Report, GL Summary Report, All Caregivers, Client Type = All, Zones = All,	pdf	Ready	✓



The screenshot shows the 'My Reports' interface after the report has been finalized. The 'Reimbursements' report row now has a black background, and the green checkmark in the 'Finalize' column is highlighted with a red box.

Queued On ↓	Report Name	Criteria	File Type	Download	Finalize
08/23/2021 12:46 PM	Reimbursements	Criteria: Main Report, Summary Report, GL Summary Report, All Caregivers, Client Type = All, Zones = All,	pdf	Ready	✓

Include shifts from previous periods in Reimbursement Exports

HOW TO USE:

1. The option to "Include Non-Exported Items" has been added to the Reimbursement Exports.
2. This option is enabled by default and will include approved items in prior periods not yet exported. This may be a result of late time sheet entries.

Preview for Export [Reimbursements]

Export Selections

Reimbursement Period:

From Date:

To Date:

Types:

- Check All
- Medicaid Waiver
- Orthopedic
- Veterans Administrat
- None
- Medical
- Private Duty
- Bookkeeping
- Neurological
- Surgical

Zones:

- Check All
- Coeur d'Alene
- Mead
- Post Falls
- Spokane
- Bonners Ferry
- Hayden
- Medical Lake
- Sandpoint
- Spokane Valley
- Cheney
- Liberty Lake
- Newport
- Silver Valley

Employees: All Selection

Include Non-exported Items:

If you make a mistake...You can now clear your export

HOW TO USE:

1. The "Export Name" field has been added to the selection criteria of the Clear Exported Items.
2. When selecting to clear exported items you may pick the appropriate Export type from a dropdown picklist.
3. This export selection ensures the appropriate data fields are displayed in the submit preview grid.

The screenshot shows a dialog box titled "Select date range to clear exported items". It contains an "Export Selections" section with the following fields: "Visit Start Date:" and "Visit End Date:" (both with calendar icons), "Export Name:" (a dropdown menu highlighted with a red box), "Employees:" (a dropdown menu set to "All"), and "Zone:" (a group of checkboxes for various locations: Check All, Coeur d'Alene, Mead, Post Falls, Spokane, Bonners Ferry, Hayden, Medical Lake, Sandpoint, Spokane Valley, Cheney, Liberty Lake, Newport, and Silver Valley). At the bottom, there are three buttons: "Submit Preview", "Clear Selected", and "Cancel".

This screenshot shows the same dialog box as above, but with the "Export Name:" dropdown menu open. The dropdown list is highlighted with a red box and contains the following items: "HCE Export", "QuickBooks Time Activity - Approved Visits", "QuickBooks Time Activity - Completed Visits", "Reimbursements", "ADP 01", "ProLiant - Completed Visits", "CertiPay Reimbursement", "Paylocity Reimbursement", and "ADP Generic".

Easily identify when contiguous visits broken due to edits or early check out

HOW TO USE:

1. The "Contiguous Visit" indicators will now be removed when broken due to manual edits and or early check outs.
2. The contiguous linkage is now stored in the visit history when it is removed.

Visit Details | Visit History | Client Orders | Captured Documents

Client: Cula, Calvin Subscriber: PVT/None **Contiguous Visit (first)**

Visit Start: 08/19/2021 Duration: 01:00 Start Time: 08:00 AM End Time: 09:00 AM

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

Subscriber: 1 - Private Pay, , Calvin Cula

Assign Caregiver: Busy, Brandon [CNA]

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

Client: Cula, Calvin Subscriber: PVT/None

Visit Start: 08/19/2021 Duration: 00:45 Start Time: 08:00 AM End Time: 08:45 AM

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

Subscriber: 1 - Private Pay, , Calvin Cula

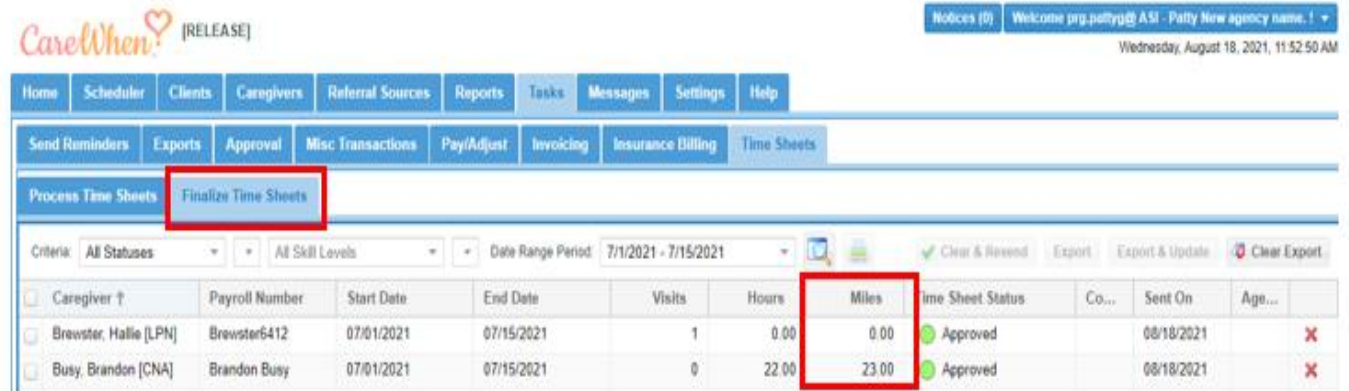
Assign Caregiver: Busy, Brandon [CNA]

Date / Who ↓	Assigned To	Visit Info	Other
08/22/2021 03:07 PM Update by Gouin, Patty [RN] Contiguous link removed		Visit Rates Charge Hourly: 42.00 04:00 Pay Hourly: 11.89 04:00	
08/22/2021 03:07 PM Update by Gouin, Patty [RN]		Duration 00:45 04:00 Stop When 08:45 AM 09:00 AM Status ● Completed Site	
08/22/2021 03:04 PM Update by Gouin, Patty [RN]		Status ● Started Site	

Mileage is now easily identified on the Finalize Time Sheet grid

HOW TO USE:

1. A new "Miles" column has been added to the "Finalize Time Sheet" grid.
2. This column easily identifies the mileage included on the "Time Sheet."



The screenshot displays the CareWhen! [RELEASE] web application interface. The top navigation bar includes links for Home, Scheduler, Clients, Caregivers, Referral Sources, Reports, Tasks, Messages, Settings, and Help. Below this, there are tabs for Send Reminders, Exports, Approval, Misc Transactions, Pay/Adjust, Invoicing, Insurance Billing, and Time Sheets. The 'Finalize Time Sheets' tab is selected and highlighted with a red box. The main content area shows a grid with the following columns: Caregiver ↑, Payroll Number, Start Date, End Date, Visits, Hours, Miles, Time Sheet Status, Co..., Sent On, and Age... The 'Miles' column is highlighted with a red box. The data rows are as follows:

Caregiver ↑	Payroll Number	Start Date	End Date	Visits	Hours	Miles	Time Sheet Status	Co...	Sent On	Age...
Brewster, Halle [LPN]	Brewster6412	07/01/2021	07/15/2021	1	0.00	0.00	Approved		08/18/2021	✗
Busy, Brandon [CNA]	Brandon Busy	07/01/2021	07/15/2021	0	22.00	23.00	Approved		08/18/2021	✗

Billing modifiers can be added at the charge code level

HOW TO USE:

1. Four modifier fields have been added to the add/edit "Charge Code" screen.
2. This allows easy setup for charge codes requiring modifiers for billing.
3. Modifier fields on the "Custom Charge Codes" tab of the Insurance Company will still be used if they exist

The screenshot shows the 'Edit Charge Code [35010]' form with the 'Reimbursement Settings' tab selected. The form contains the following fields and values:

- Effective Date: [calendar icon]
- Skill Type: PCA
- Charge Code: 35010
- Description: CNA Hourly
- Type of Service: AC - Attendant Care
- Invoice Code: [input]
- Modifier 1: [input]
- Modifier 2: [input]
- Modifier 3: [input]
- Modifier 4: [input]
- Revenue Code: [input]
- Service Item: [input]
- Charge Rates: Hourly: \$ 0.00, Flat: [input]
- Reduce By Minutes: 0
- Pay Rates: Hourly: \$ 0.00, Flat: [input]
- Taxable
- Flexible Scheduling

Buttons at the bottom: Save & Close, Cancel

Auto Post Steps easily identified by updated buttons

HOW TO USE:

1. If using the "Auto Post" feature, the labels have been updated to make the action more identifiable.
2. The "Post All Payments" button has alternating text based on selection.

CareWhen [INTEGRATION]

Home Scheduler Consumers Pers Assts Referral Sources Reports Tasks Messages Settings

Send Reminders Exports Approval Misc Transactions Pay/Adjust Invoicing Insurance Billing

Pay/Adjust Open Items Auto Post Pay/Invoice

Payment Date: Enter or select date Post All Payments Filters: Consumer name...

<input type="checkbox"/>	Consumer	Payor	Insurance Co	Service Date	Charge Cod
No payments found.					

Page 0 of 0 Page Size: 25

Summary Queue

Show Payments Search: Check #...

Queued On ↓	Amount Exception	Amount Posted	Check Amount
No report entries found.			